Apple CRM
User Guide

April 2017

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Apple CRM Overview

Apple CRM is a customer relationship management system where you will build and track customer relationships and help customers buy — all in one place. Apple CRM is part of an Apple wide initiative to improve visibility of business customer activity across Apple, develop more efficient workflows for our teams, and improve the experience of our business customers.

This guide is designed to provide the details you need to learn how to use Apple CRM. Use this resource to become familiar with a new way to connect with our customers and guide their customer journey.

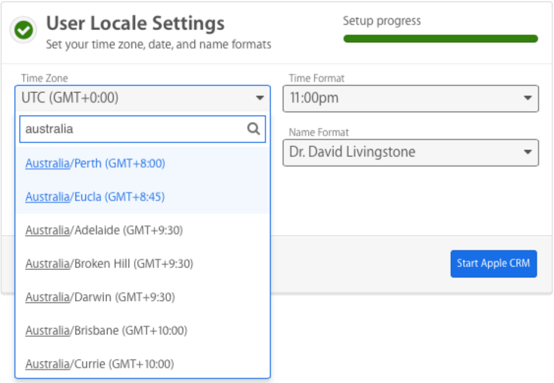
Access Apple CRM

The URL for Apple CRM is applecrm.corp.apple.com.

Sign in with your AppleConnect credentials. Access to Apple CRM is managed through accessmanager.apple.com. Apple Retail employees with Business roles are automatically provisioned to their home store.

Set Time Zone and Preferences

1. Next, you will set your time zone and your preferences for date, time and, name formats.
2. When you first sign in, you will see a window to set your time zone and format preferences for date, time, and name.
3. Set your time zone to the region closest to you by typing in or selecting the region. For example in the US, start by typing America into the window and select the region closest to you. For EMEA, type Europe.



User Locale Settings

Set your time zone, date, and name formats

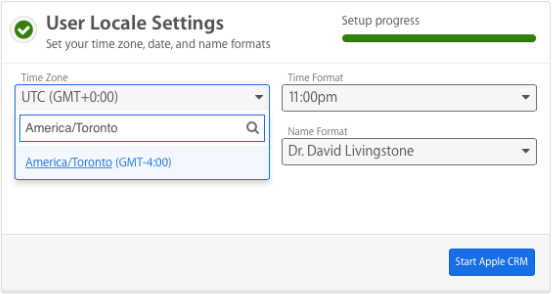
Time Zone: UTC (GMT+0:00)

australia

Time Format: 11:00pm

Name Format: Dr. David Livingstone

Setup progress
Australia/Perth (GMT+8:00)
Australia/Eucla (GMT+8:45)
Australia/Adelaide (GMT+9:30)
Australia/Broken Hill (GMT+9:30)
Australia/Darwin (GMT+9:30)
Australia/Brisbane (GMT+10:00)
Australia/Currie (GMT+10:00)
Start Apple CRM



User Locale Settings

Set your time zone, date, and name formats

Time Zone: UTC (GMT+0:00)

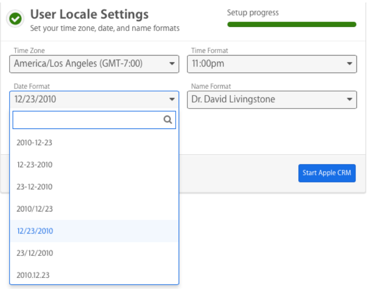
America/Toronto

Time Format: 11:00pm

Name Format: Dr. David Livingstone

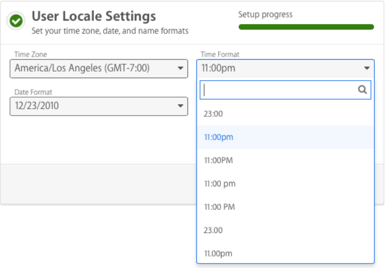
Setup progress
America/Toronto (GMT-4:00)
Start Apple CRM

4. Select a preferred date format.


User Locale Settings
Set your time zone, date, and name formats
Setup progress
2010-12-23
12-23-2010
23-12-2010
2010/12/23
12/23/2010
23/12/2010
2010.12.23
Start Apple CRM

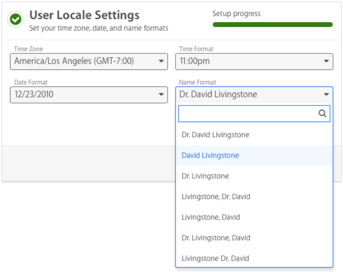
Time Zone: America/Los Angeles (GMT-7:00)
Time Format: 11:00pm
Date Format: 12/23/2010
Name Format: Dr. David Livingstone

5. Select a time format.


User Locale Settings
Set your time zone, date, and name formats
Setup progress
23:00
11:00pm
11:00PM
11:00 pm
11:00 PM
23.00
11.00pm

Time Zone: America/Los Angeles (GMT-7:00)
Time Format: 11:00pm
Date Format: 12/23/2010

6. Select a name formate for Contacts and any other names displayed in the tool.

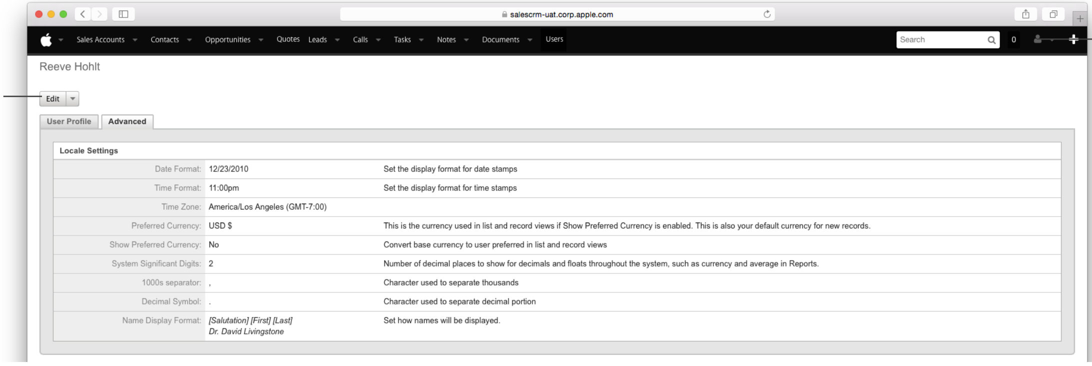

User Locale Settings
Set your time zone, date, and name formats
Setup progress
Dr. David Livingstone
David Livingstone
Dr. Livingstone
Livingstone, Dr. David
Livingstone, David
Dr. Livingstone, David
Livingstone Dr. David

Time Zone: America/Los Angeles (GMT-7:00)
Time Format: 11:00pm
Date Format: 12/23/2010
Name Format: Dr. David Livingstone

7. Once completed, select Start Apple CRM.

8. You will then be logged in to the system and see your Dashboard.

9. If you wish to change any of these settings, select the User icon in the upper right corner of the Toolbar and then the Edit button on the left side of the page to change these preferences.


salescrm-uat.corp.apple.com
Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Users
Search
0
Edit
User Profile
Advanced

Select the Edit button

Select the User button

Reeve Hohlt

Locale Settings

Date Format:	12/23/2010	Set the display format for date stamps
Time Format:	11:00pm	Set the display format for time stamps
Time Zone:	America/Los Angeles (GMT-7:00)	
Preferred Currency:	USD $	This is the currency used in list and record views if Show Preferred Currency is enabled. This is also your default currency for new records.
Show Preferred Currency:	No	Convert base currency to user preferred in list and record views
System Significant Digits:	2	Number of decimal places to show for decimals and floats throughout the system, such as currency and average in Reports.
1000s separator:	,	Character used to separate thousands
Decimal Symbol:	.	Character used to separate decimal portion
Name Display Format:	*[Salutation] [First] [Last]* *Dr. David Livingstone*	Set how names will be displayed.

User Interface

Key Concepts

To get started, familiarize yourself with key concepts of Apple CRM as they relate to your frequent workflows and the previous Engage concepts.

Apple CRM	Concept (Grouped by Module)	Engage Term
	User Interface	
"+" button	Quick Create Sales Accounts, Opportunities, Leads, Documents and Compose Emails, Log Calls, Schedule Meetings, Create Tasks, Create Notes or Attachment.	N/A
Dashboard	Initial landing page when logging into Apple CRM that provides an overview of recent activity such as open Opportunities and recently viewed Sales Accounts. The Dashboard is configured to display relevant information in an easy to consume presentation.	N/A
	Sales Accounts	
Sales Accounts	The account record where customer information, Opportunities and engagement are documented. The Sales Account is the primary location where Apple Business teams will capture key information on the customer relationship and journey to deepen and enhance our ability to delivery timely and relevant solutions.	Company Profile
Account Team	The team of sales people across Apple collaborating on the Sales Account. Account Teams have the ability to edit and create objects within a Sales Account. An Account Team can be made up of multiple sales teams across Apple Direct channels and within Apple Direct channels such as two Retail Stores that engage a single Sales Account. Any member of the Account team can add other Apple CRM which extends full edit ability on that specific Sales Account.	N/A
Sales Team	Members of a team within a territory such as all members of the Business Team in a Retail Store. Sales Teams have the ability to edit and create Opportunities in their territory (Retail Store) within a Sales Account that is owned by another Account Team but cannot edit the core Sales Account data. Multiple Sales Teams can be part of an Account Team which is made up of the Sales Teams that collaborate on a Sales Account.	N/A
Contacts	Information of individuals (contacts) that are tied to a single customer record. Use this function as an easy way to access contacts to grow and manage customer relationships.	Contacts
Core Profile	The basic set of customer information that is displayed across the Sales Account, Opportunities, and Quotes section.	Discovery
Named Accounts	This field will be increasingly used as other Apple teams begin using Apple CRM (e.g. Enterprise, Education, etc). This field will be used on Sales Accounts where primary coverage is provided by those Apple teams.	N/A
Organization Name	An Organization Name is the name provided by the Contact when an Introduction was created and brought in to Apple CRM as a Lead. Organization Name is typically the same as the Sales Account Name, but the field can be used as the trading name for a Sales Account.	Company Name

Apple CRM	Concept	Engage Term
Master Data Management	The governing team for master data related to Apple CRM. The primary function of this team is to make sure Sales Accounts are properly curated and linked to a customer's SAP Sold To. Contact: master_data@apple.com	N/A
RTM	This is an abbreviation for route to market which are the ways (channels) customers can buy Apple products. This includes Retail, Enterprise, Education, and external channel partners.	N/A
Global 500	Annual ranking of the top 500 companies in the world by revenue. This field in Apple CRM will designate if a Sales Account is ranked in the Global 500.	N/A
Fortune 500	Annual ranking of the top 500 U.S. companies by revenue. This field in Apple CRM will designate if a Sales Account is ranked in the Fortune 500.	N/A
National ID	This field will show the Sales Account's government issued registration number which is issued in many countries where central registration is required to establish a business.	N/A
Primary Territory	Each Sales Account is assigned a Primary Territory based on the Primary Account Owner(s) location. For example, each Retail Store is a territory.	N/A
Territory Management	The Territory Management system is connected to Apple CRM to allow for accurate assignment of Account Team and Sales Team based on Retail Stores, Retail Territories, or other customer engagement coverage models. This new system allows for more flexibility and specific use cases within Apple. The Master Data Management team overseas this information and system.	Territory
Ticker Symbol	If the Sales Account is listed on a public stock exchange such as the NASDAQ or New York Stock Exchange, the symbol used to trade their stock may be listed here.	Territory
DBA Name	"Doing Business As" name and also known as trade name is used by companies who operate under a different name from the name of the legally registered business entity.	N/A
Member Organizations	Satellite or Divisions of a Sales Account that are directly related to the Sales Account the user is viewing.	N/A
LCY	Local Currency — Lifetime Spend and Annual Spend can be shown in both USD (United States Dollars) and Local Currency (LCY).	N/A

Apple CRM	Concept	Engage Term
Opportunities and Quotes		
Opportunities	Opportunities are used to capture customer interest in future Apple purchases and to document the planned follow up through the Apple Steps of Service. Opportunity Engagement workflows can be expanded with the additional level of customer details in Apple CRM. An Opportunity may contain multiple Quotes with different hardware and software solutions.	Opportunities
Forecast	View of the primary Quotes from open Opportunities for that Territory that are expected to close within a specified timeframe.	Pipeline
Opportunity Owner	Member of a Sales Team that is the lead on a specific Opportunity.	N/A
Quotes	Line item level proposal for a customer created for an Opportunity. Our primary quoting platform, SAP CRM, can be launched from the Quote details page to add specific products and solutions to deliver a customer facing proposal.	Proposals
SEA (Sales Exception Approval)	SEA is a platform shared across Apple which allows for Quote Approval for larger dollar value Quotes or those submitted with user added discounts in SAP CRM. SEA is direct linked from each Quote details page and shows specific information on the request, time submitted, routing, and product pricing.	Opportunity Engagement Approval Steps
Leads (Introductions)		
Lead	Created when we meet a new customer and begin the relationship. Introductions created in Retail Stores and Online become Leads in Apple CRM to be qualified through follow up activities.	Introduction
Activities		
Activities	There are three main types of Activities — Tasks, Calls, and Notes. Activities are various actions such as an Outbound Call, a Note or Task that a sales team can record in Apple CRM.	N/A
Documents	Files related to a Sales Account or Opportunity.	Attachments
Calls	A feature in Apple CRM that allows teams to schedule and document Inbound and Outbound Calls to customers.	N/A
Notes	View of text or attachments connected to a Contact, and sub-related a Sales Account, Contact, Opportunity, Task, Product Catalog, Quote, Quoted Line Item, Contract, Email, Bug, Project, Project Task, Target, Case, Lead, Meeting, or Call.	Opportunity Notes
Tasks	Actions that are set or scheduled by a team and need to be completed. Examples of these actions are to follow up on a customer account or updating Sales Accounts.	Tasks

User Interface Overview

The Apple CRM utilizes key User Interface (UI) elements to deliver a easy to use and information rich view into our customer information. This section details the key elements of the User Interface and how you can work efficiently in the CRM.

Toolbar

The Toolbar is available across all views within Apple CRM. Here, you will access the different modules such as Sales Accounts and Opportunities.

You can also access common actions from the drop down arrow next to each module. For example, the Calls Toolbar drop down allows you to quickly Log a Call without needing to view the Calls module.

Global Search field to locate Contacts, Sales Accounts, Opportunities and other categories in Apple CRM. Apple CRM can search by Sold To and Sales Order Number.

Access the My Dashboard view and your Activity Stream by clicking the drop down arrow next to the Apple logo

Access the Contacts module to view and edit Contacts

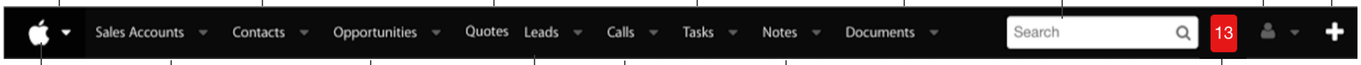
Access the Quotes module to view and edit recent Quotes

Access the Tasks module to view or create Tasks

Access the Documents module to view or upload new files related to Sales Accounts

Access your User Profile and Log Out of Apple CRM

Quick create items such as Sales Accounts and Meetings



Access your Dashboard by selecting the Apple logo

Access the Sales Account Module to search and view Sales Accounts

Access the Opportunities module to view and create Opportunities

Access the Calls module to view and log Calls to customers

Access the Notes module to view or create Notes and Attachments

Apple CRM provides notifications for important events and messages as indicated by the red icon. Click the icon to view these notifications

Access the Leads module to view and convert new Leads

Dashboard

Each user has a Dashboard that is the primary landing page when logging into the CRM. This Dashboard is deployed with Dashlets which each summarize key information that is available at a glance. The Dashboard is designed to give Apple Business teams relevant information about their customers, upcoming events, progress updates, access to key Tasks, and view into pending Opportunities and Quotes.

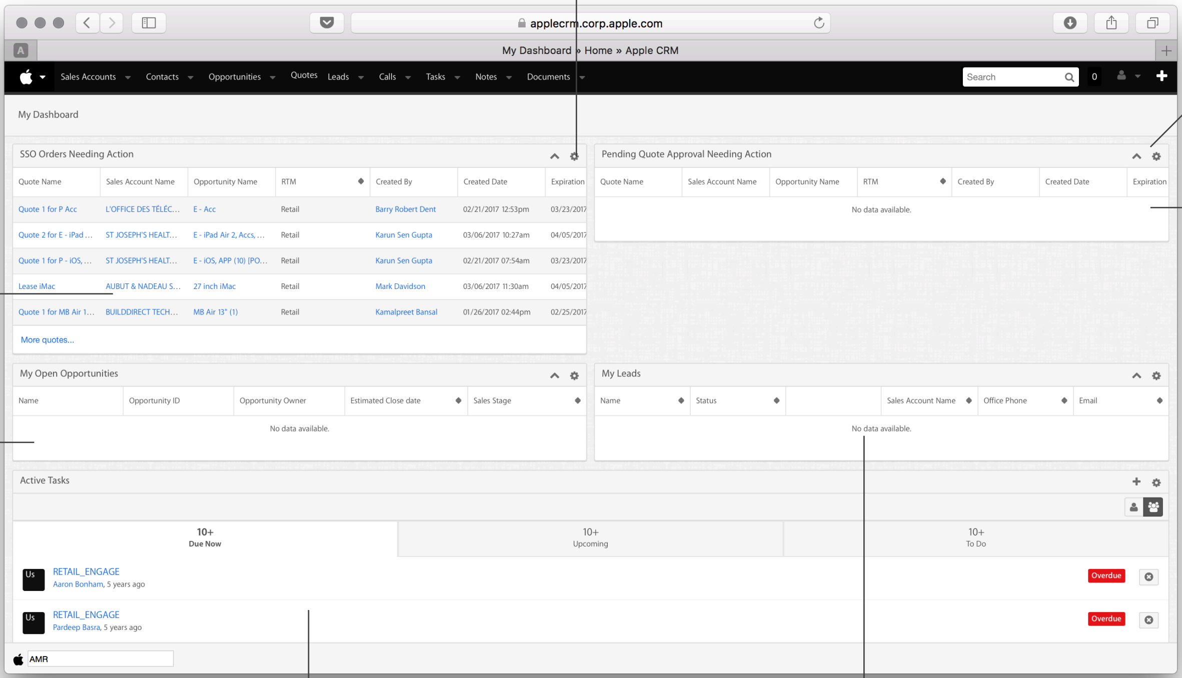
Configuration tool allows user to refresh data in a dashlet

Open/Close window

Displays any Opportunities that have been submitted for Apple Approval and need action

Displays orders that have been sent to SSO for booking but have been pushed back for more information

Displays all current Open Opportunities you are leading



My Dashboard

SSO Orders Needing Action

Quote Name	Sales Account Name	Opportunity Name	RTM	Created By	Created Date	Expiration
Quote 1 for P Acc	L'OFFICE DES TÉLÉC…	E - Acc	Retail	Barry Robert Dent	02/21/2017 12:53pm	03/23/2017
Quote 2 for E - iPad …	ST JOSEPH'S HEALT…	E - iPad Air 2, Accs, …	Retail	Karun Sen Gupta	03/06/2017 10:27am	04/05/2017
Quote 1 for P - iOS, …	ST JOSEPH'S HEALT…	E - iOS, APP (10) [PO…	Retail	Karun Sen Gupta	02/21/2017 07:54am	03/23/2017
Lease iMac	AUBUT & NADEAU S…	27 inch iMac	Retail	Mark Davidson	03/06/2017 11:30am	04/05/2017
Quote 1 for MB Air 1…	BUILDDIRECT TECH…	MB Air 13" (1)	Retail	Kamalpreet Bansal	01/26/2017 02:44pm	02/25/2017

More quotes...

Pending Quote Approval Needing Action

Quote Name	Sales Account Name	Opportunity Name	RTM	Created By	Created Date	Expiration

No data available.

My Open Opportunities

Name	Opportunity ID	Opportunity Owner	Estimated Close date	Sales Stage

No data available.

My Leads

Name	Status		Sales Account Name	Office Phone	Email

No data available.

Active Tasks

10+ **Due Now**	10+ Upcoming	10+ To Do

Us RETAIL_ENGAGE
Aaron Bonham, 5 years ago
Overdue

Us RETAIL_ENGAGE
Pardeep Basra, 5 years ago
Overdue

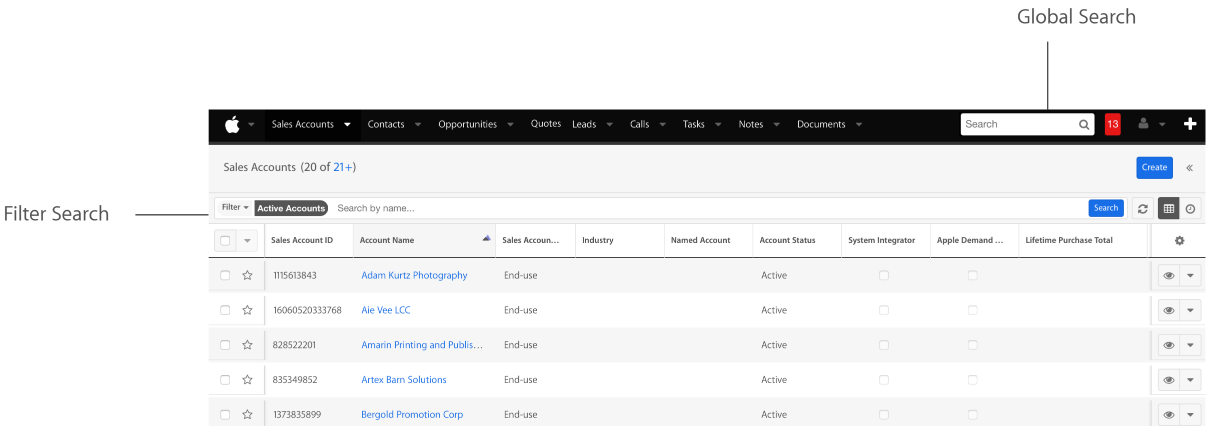
View Tasks that are due now or upcoming. Use the person icon on the right hand side to toggle between Tasks assigned to you and Tasks assigned ot your team

Displays Leads in any status that are currently assigned to you

Global Search and Filter Search

In Apple CRM, you can use the Global Search or Filter Search to search for specific records within a list of many items including a list of Sales Accounts, Contacts or Opportunities. Global search can be limited to a single Module, for example you can use Global Search only in the Sales Account Module.

Global search is the place to begin for quickly finding single records. Please note that SAP Sold To and Sales Order Numbers can be used in Global Search (enabled for April 2017 rollout).


Global Search

Filter Search

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
13
Create
Filter
Active Accounts
Search by name...
Search

Sales Accounts (20 of 21+)

Sales Account ID	Account Name	Sales Accoun…	Industry	Named Account	Account Status	System Integrator	Apple Demand …	Lifetime Purchase Total
1115613843	Adam Kurtz Photography	End-use			Active	☐	☐	
16060520333768	Aie Vee LCC	End-use			Active	☐	☐	
828522201	Amarin Printing and Publis…	End-use			Active	☐	☐	
835349852	Artex Barn Solutions	End-use			Active	☐	☐	
1373835899	Bergold Promotion Corp	End-use			Active	☐	☐	

Global Search — Global Search is located in the toolbar across the top of Apple CRM. You can locate records across the whole system and then apply filters to narrow or zoom into set of results.

How Global Search Works

- Uses "OR" functionality so that if you enter multiple search terms, each of those search terms is used independently to find records. For instance, Johnny Appleseed will return records with Johnny or Appleseed included.
- Search results are ranked by the number of times that data appears in the CRM.

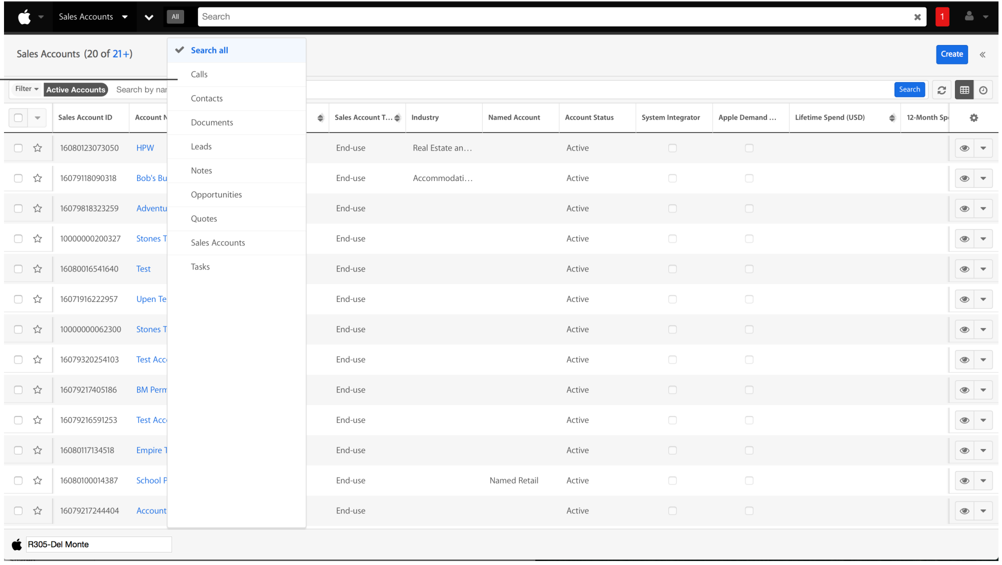
When to use Global Search

- To locate records using very specific information within that record such as a customer's phone number or email address.
- To find records across the entire system. For this use case, we recommend filters be applied on the results to target a set of information. Otherwise, Global Search will return a very broad set of results.
- For the April 2017 release you can now search by Order Number and SAP Sold To

You can narrow Global Search against a specific category by selecting the category in the drop down menu next to the Global Search field.

Enter a search term here

Select from the drop down list to narrow the Global Search against a category such as Opportunities



Sales Account ID	Account N	Sales Account T…	Industry	Named Account	Account Status	System Integrator	Apple Demand …	Lifetime Spend (USD)	12-Month Sp
16080123073050	HPW	End-use	Real Estate an…		Active	☐	☐		
16079118090318	Bob's Bu	End-use	Accommodati…		Active	☐	☐		
16079818323259	Adventu	End-use			Active	☐	☐		
10000000200327	Stones T	End-use			Active	☐	☐		
16080016541640	Test	End-use			Active	☐	☐		
16071916222957	Upen Te	End-use			Active	☐	☐		
10000000062300	Stones T	End-use			Active	☐	☐		
16079320254103	Test Acc	End-use			Active	☐	☐		
16079217405186	BM Perm	End-use			Active	☐	☐		
16079216591253	Test Acc	End-use			Active	☐	☐		
16080117134518	Empire T	End-use			Active	☐	☐		
16080100014387	School P	End-use		Named Retail	Active	☐	☐		
16079217244404	Account	End-use			Active	☐	☐		

Filter Search — Filter search is available in the List view of each module to find records with specific criteria and attributes. Filter search returns results only per the Territory selected (bottom Left of screen menu). The Search by Name field can be used in addition to a filtered search to narrow based on text matching to the results.

For example, you can narrow down to the list of your team's Sales Accounts instead of seeing a list of all Sales Accounts in your territory. Filter should be used within modules to access Contacts, Opportunities, and Quotes which are relevant to your daily and weekly workflows.

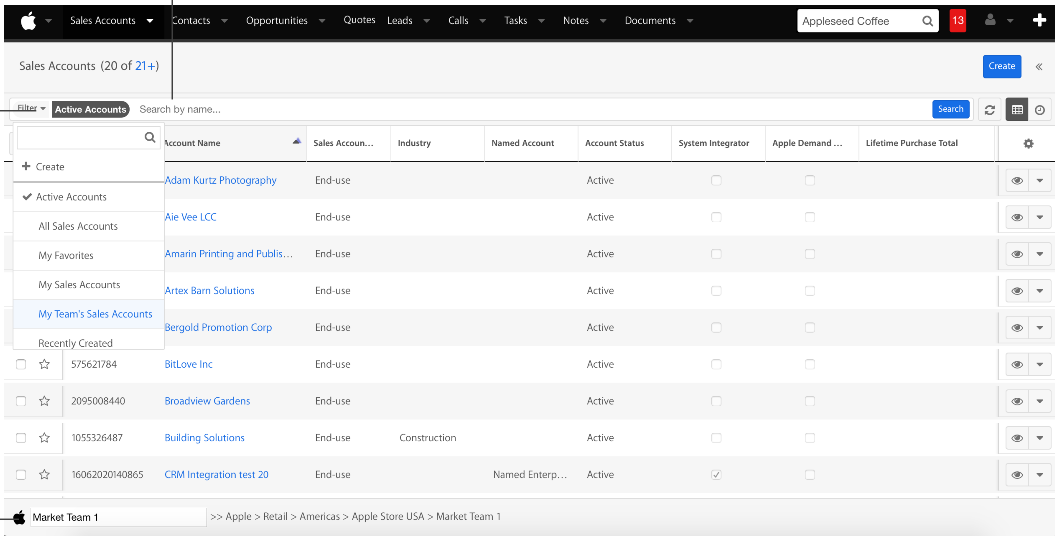
How Filter Search Works

- Select a preset Filter such as My Accounts or create your own Filter to enter your own search criteria. See the Creating a Filter section of this guide for details.
- In addition to the Filter, you can enter search terms into the search bar to further refine the Filter.
- Typing keywords in the search bar further refines to those with a text match
- Filter Search uses "AND" functionality so that if you are searching for multiple terms, it will only return records matching all (vs. any) of the search criteria. For example, searching for Green Associates will return results matching Green *and* Associates versus all results that contain Green or Associates - the way Global Search would
- When navigating away from a Filtered search, the search results will be saved and then displayed when you return back to that module in List View

When to use Filter Search

- Locating a set of records within your territory such as all Sales Accounts with $5,000 or more in 12 month spend
- To search for records within a module using specific detailed attributes such as Opportunities in Approach status

Narrow a list by entering a search term into the Filter field



Sales Accounts (20 of 21+)

	Account Name	Sales Accoun…	Industry	Named Account	Account Status	System Integrator	Apple Demand …	Lifetime Purchase Total
	Adam Kurtz Photography	End-use			Active	☐	☐	
	Aie Vee LCC	End-use			Active	☐	☐	
	Amarin Printing and Publis…	End-use			Active	☐	☐	
	Artex Barn Solutions	End-use			Active	☐	☐	
	Bergold Promotion Corp	End-use			Active	☐	☐	
575621784	BitLove Inc	End-use			Active	☐	☐	
2095008440	Broadview Gardens	End-use			Active	☐	☐	
1055326487	Building Solutions	End-use	Construction		Active	☐	☐	
16062020140865	CRM Integration test 20	End-use		Named Enterp…	Active	☑	☐	

Market Team 1 >> Apple > Retail > Americas > Apple Store USA > Market Team 1

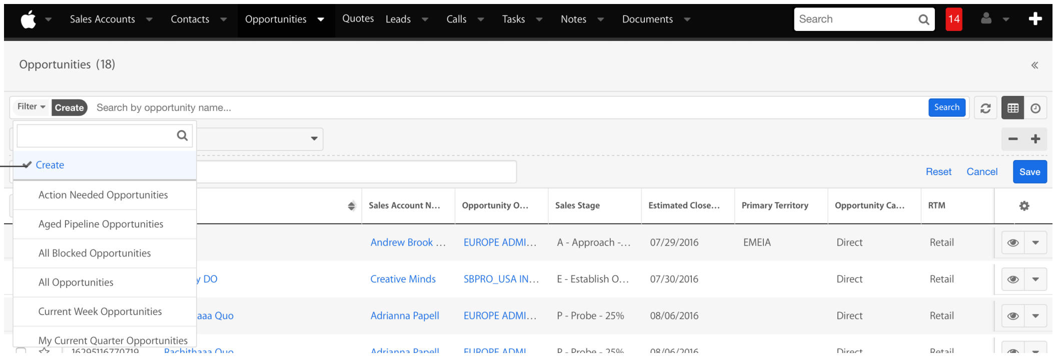
Select the arrow next to Filter to select a preset Filter that will return a subset of records such as only the Sales Accounts managed by your team

Make sure your territory is set to your Store or Market depending on your coverage. This will also help limit your search to accounts within your Store or Market

Create a new Filter Search

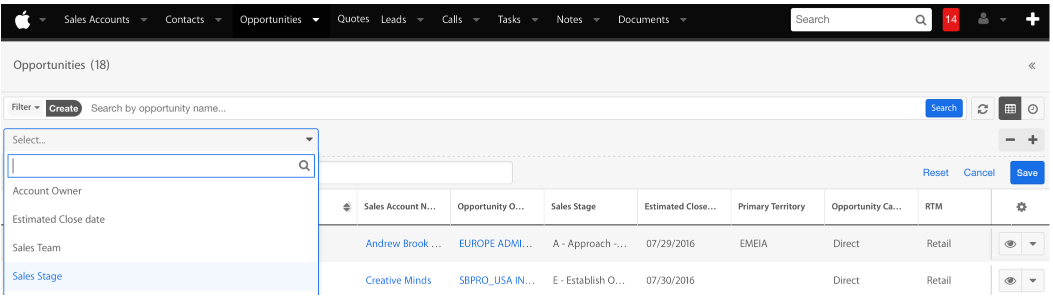
In Apple CRM, you can create and save new Filters across one or multiple criteria for common ways you refine a list of records that are in addition to the preset Filters.

1. Select the arrow next to Filter and select Create.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Opportunities (18)
Filter
Create
Search by opportunity name...
Search
Reset
Cancel
Save
Create
Action Needed Opportunities
Aged Pipeline Opportunities
All Blocked Opportunities
All Opportunities
Current Week Opportunities
My Current Quarter Opportunities
Sales Account N...
Opportunity O...
Sales Stage
Estimated Close...
Primary Territory
Opportunity Ca...
RTM
Andrew Brook ...
EUROPE ADMI...
A - Approach -...
07/29/2016
EMEIA
Direct
Retail
Creative Minds
SBPRO_USA IN...
E - Establish O...
07/30/2016
Adrianna Papell
P - Probe - 25%
08/06/2016

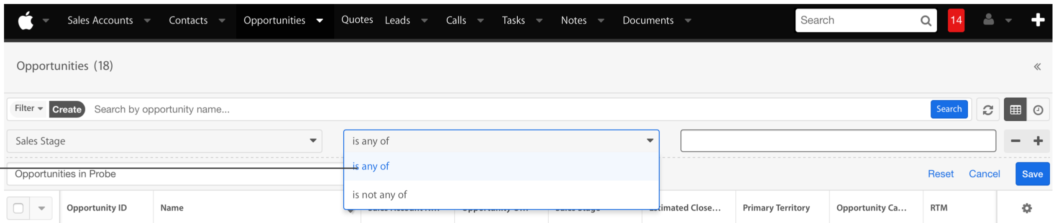
Select Create from the Filter drop down menu

2. Select a Criteria such as Sales Stage.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Opportunities (18)
Filter
Create
Search by opportunity name...
Search
Select...
Account Owner
Estimated Close date
Sales Team
Sales Stage
Reset
Cancel
Save
Sales Account N...
Opportunity O...
Sales Stage
Estimated Close...
Primary Territory
Opportunity Ca...
RTM
Andrew Brook ...
EUROPE ADMI...
A - Approach -...
07/29/2016
EMEIA
Direct
Retail
Creative Minds
SBPRO_USA IN...
E - Establish O...
07/30/2016

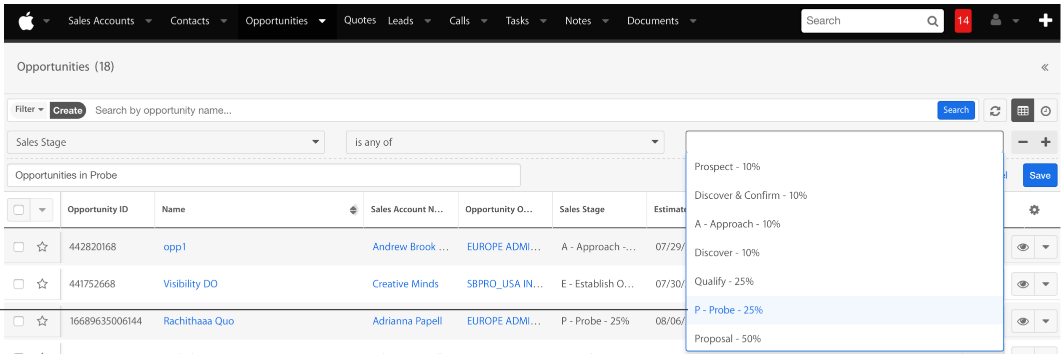
Select a Filter criteria such as Sales Stage

3. Select an operator such as "is any of" or "is equal to" to include or exclude records based on whether they match the criteria.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Opportunities (18)
Filter
Create
Search by opportunity name...
Search
Sales Stage
is any of
is any of
is not any of
Opportunities in Probe
Reset
Cancel
Save
Opportunity ID
Name
Estimated Close...
Primary Territory
Opportunity Ca...
RTM

Select an operator

4. Enter or select from Filter values such as the Probe sales stage to in this example. Depending on the Filter type used, you can enter in specific values such as an Apple CRM Sales Account ID to filter to a specific record.

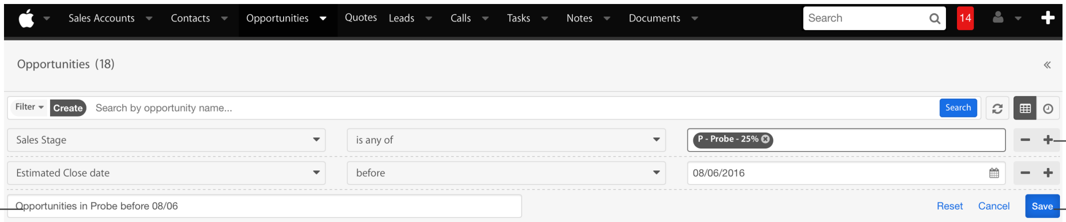

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Opportunities (18)
Filter
Create
Search by opportunity name...
Search
Sales Stage
is any of
Opportunities in Probe
Save
Prospect - 10%
Discover & Confirm - 10%
A - Approach - 10%
Discover - 10%
Qualify - 25%
P - Probe - 25%
Proposal - 50%
Opportunity ID
Name
Sales Account N...
Opportunity O...
Sales Stage
442820168
opp1
Andrew Brook ...
EUROPE ADMI...
A - Approach -...
441752668
Visibility DO
Creative Minds
SBPRO_USA IN...
E - Establish O...
16689635006144
Rachithaaa Quo
Adrianna Papell
P - Probe - 25%

Select a Filter item such as Probe

5. Once a Filter is set, hit the return key or select the filter value to narrow the list to that filter.

6. To add multiple Filters, select the + button next to the filter bar.

7. To save the Filtered Search, enter a name for the Filter and select the blue Save button.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Opportunities (18)
Filter
Create
Search by opportunity name...
Search
Reset
Cancel
Save

Sales Stage	is any of	P - Probe - 25%
Estimated Close date	before	08/06/2016

Opportunities in Probe before 08/06

Select the + button to add another Filter

Enter a Filter name

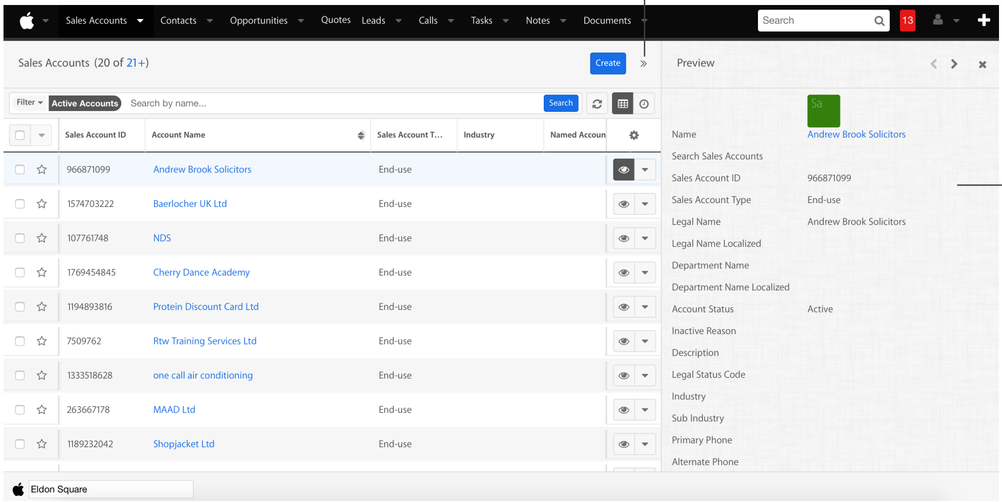
Select Save

Intelligence Pane (displayed as "Preview")

The Intelligence Pane is available throughout CRM and provides a preview of the record details. In the below example, the Intelligence Pane is used to Preview the details of a Sales Account from the list view.

The Intelligence Pane is a brand new feature of Apple CRM which allows Apple Business Teams to quickly see details of the results seen in List View. We recommend you familiarize yourself with this tool to enable quick and accurate viewing of records as you locate customer information.

Show or hide the Intelligence Pane by clicking the arrow button


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
13
Sales Accounts (20 of 21+)
Create
Filter
Active Accounts
Search by name...
Search
Preview
Eldon Square

Sales Account ID	Account Name	Sales Account T...	Industry	Named Accoun
966871099	Andrew Brook Solicitors	End-use		
1574703222	Baerlocher UK Ltd	End-use		
107761748	NDS	End-use		
1769454845	Cherry Dance Academy	End-use		
1194893816	Protein Discount Card Ltd	End-use		
7509762	Rtw Training Services Ltd	End-use		
1333518628	one call air conditioning	End-use		
263667178	MAAD Ltd	End-use		
1189232042	Shopjacket Ltd	End-use		

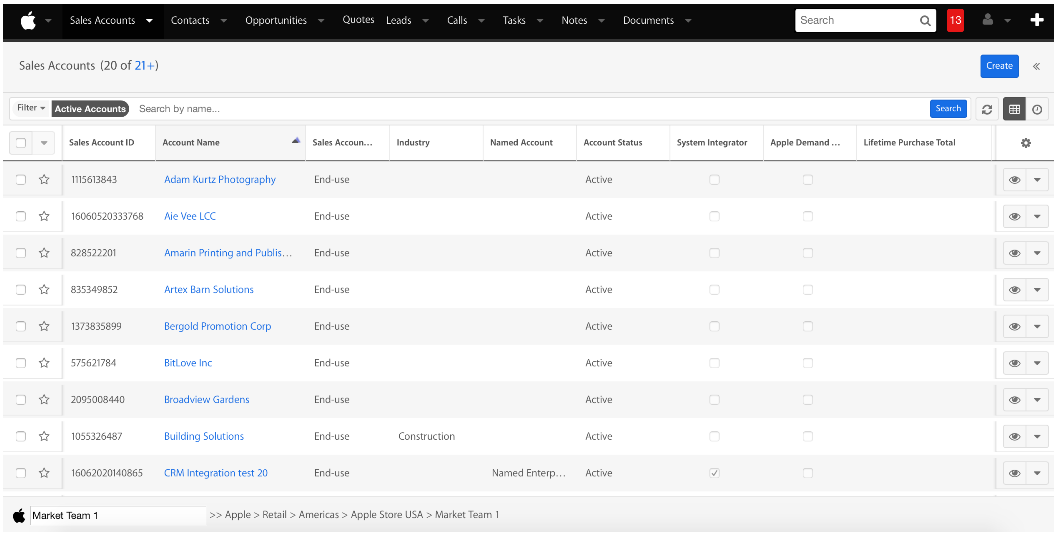
Name	Andrew Brook Solicitors
Search Sales Accounts	
Sales Account ID	966871099
Sales Account Type	End-use
Legal Name	Andrew Brook Solicitors
Legal Name Localized	
Department Name	
Department Name Localized	
Account Status	Active
Inactive Reason	
Description	
Legal Status Code	
Industry	
Sub Industry	
Primary Phone	
Alternate Phone	

The Intelligence Pane will show to the right and in this example shows a preview of a Sales Account within a list

List View and Detail View

Apple CRM uses the List View to show a list of information such as the Sales Accounts in a territory and a Detail View to show a specific entry in that list such as a Sales Account record.

List View

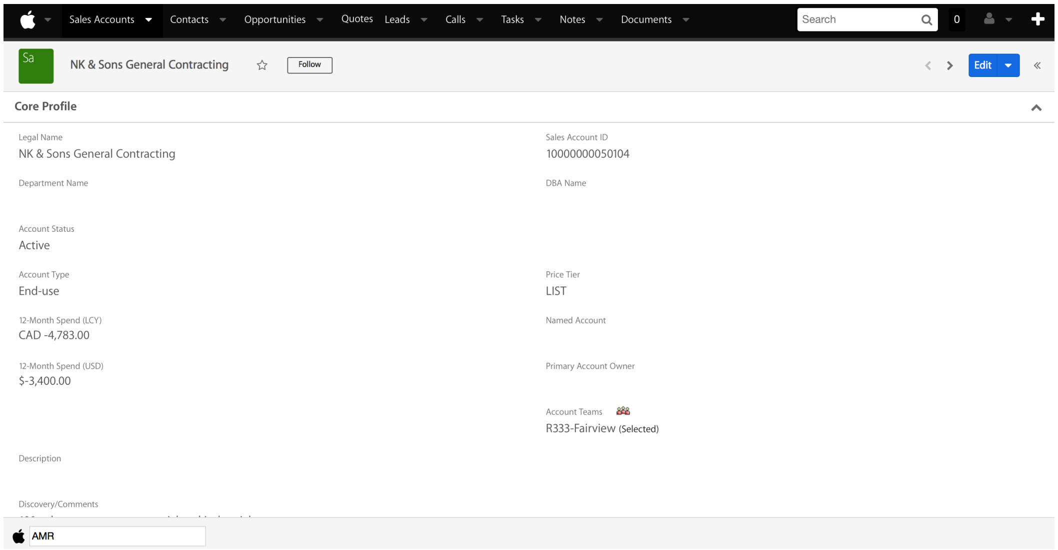

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
13
Create
Filter
Active Accounts
Search by name...
Search

Sales Accounts (20 of 21+)

☐	Sales Account ID	Account Name	Sales Accoun…	Industry	Named Account	Account Status	System Integrator	Apple Demand …	Lifetime Purchase Total
☐ ☆	1115613843	Adam Kurtz Photography	End-use			Active	☐	☐	
☐ ☆	16060520333768	Aie Vee LCC	End-use			Active	☐	☐	
☐ ☆	828522201	Amarin Printing and Publis…	End-use			Active	☐	☐	
☐ ☆	835349852	Artex Barn Solutions	End-use			Active	☐	☐	
☐ ☆	1373835899	Bergold Promotion Corp	End-use			Active	☐	☐	
☐ ☆	575621784	BitLove Inc	End-use			Active	☐	☐	
☐ ☆	2095008440	Broadview Gardens	End-use			Active	☐	☐	
☐ ☆	1055326487	Building Solutions	End-use	Construction		Active	☐	☐	
☐ ☆	16062020140865	CRM Integration test 20	End-use		Named Enterp…	Active	☑	☐	

Market Team 1 >> Apple > Retail > Americas > Apple Store USA > Market Team 1

Detail View (example Sales Account Detail View shown)


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Sa
Follow
Edit

NK & Sons General Contracting

Core Profile

Legal Name
NK & Sons General Contracting

Sales Account ID
10000000050104

Department Name

DBA Name

Account Status
Active

Account Type
End-use

Price Tier
LIST

12-Month Spend (LCY)
CAD -4,783.00

Named Account

12-Month Spend (USD)
$-3,400.00

Primary Account Owner

Account Teams
R333-Fairview (Selected)

Description

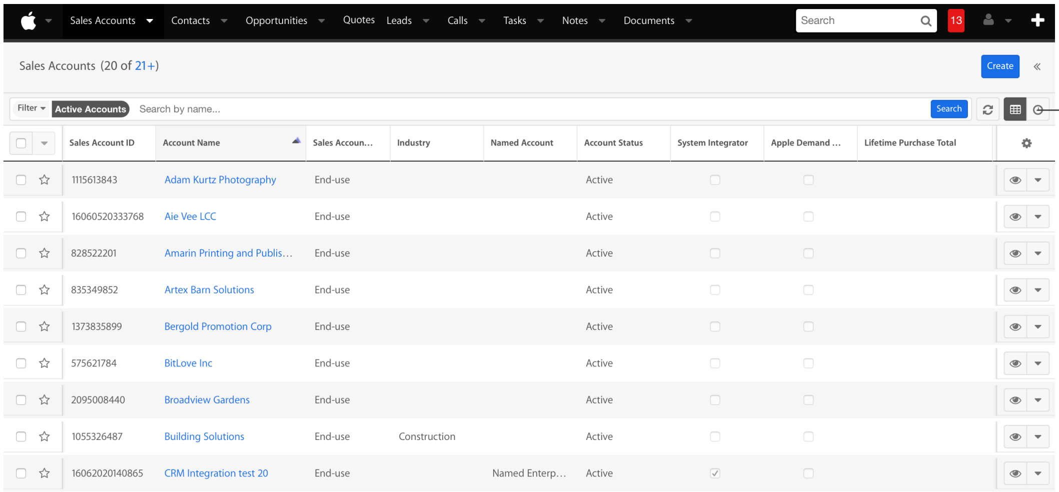
Discovery/Comments

AMR

List View and Activity Stream View

Apple CRM uses the List View to show a list of information such as the Sales Accounts in a territory and Activity Stream View to show recent activity across categories which, in this example, is Sales Account activity in the user's territory.

List View

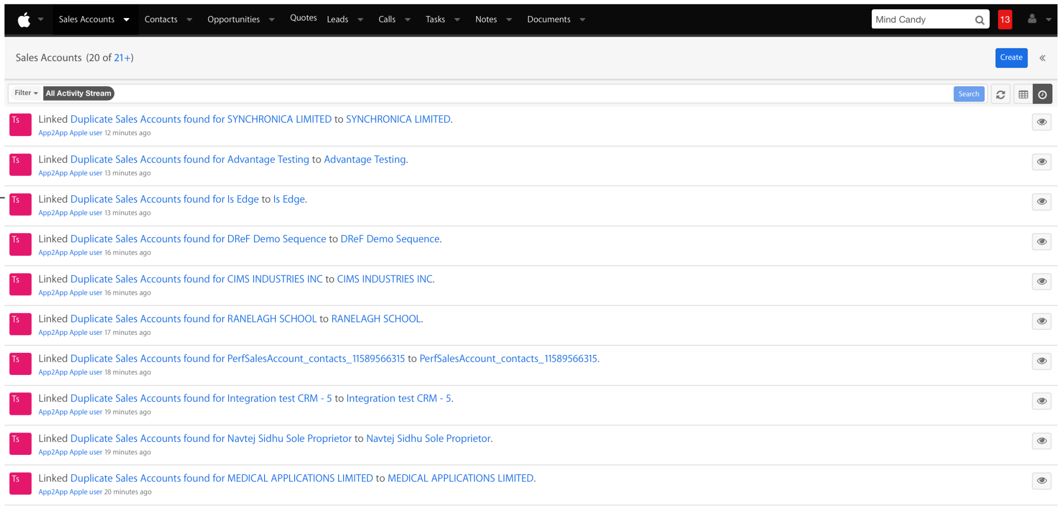

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
13
Create
Filter
Active Accounts
Search by name...
Search

Sales Accounts (20 of 21+)

Sales Account ID	Account Name	Sales Accoun…	Industry	Named Account	Account Status	System Integrator	Apple Demand …	Lifetime Purchase Total
1115613843	Adam Kurtz Photography	End-use			Active	☐	☐	
16060520333768	Aie Vee LCC	End-use			Active	☐	☐	
828522201	Amarin Printing and Publis…	End-use			Active	☐	☐	
835349852	Artex Barn Solutions	End-use			Active	☐	☐	
1373835899	Bergold Promotion Corp	End-use			Active	☐	☐	
575621784	BitLove Inc	End-use			Active	☐	☐	
2095008440	Broadview Gardens	End-use			Active	☐	☐	
1055326487	Building Solutions	End-use	Construction		Active	☐	☐	
16062020140865	CRM Integration test 20	End-use		Named Enterp…	Active	☑	☐	

Use the List View and Activity View buttons to toggle between views

Activity Stream View


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Mind Candy
13
Create
Filter
All Activity Stream
Search
Ts

Sales Accounts (20 of 21+)

Linked Duplicate Sales Accounts found for SYNCHRONICA LIMITED to SYNCHRONICA LIMITED.
App2App Apple user 12 minutes ago

Linked Duplicate Sales Accounts found for Advantage Testing to Advantage Testing.
App2App Apple user 13 minutes ago

Linked Duplicate Sales Accounts found for Is Edge to Is Edge.
App2App Apple user 13 minutes ago

Linked Duplicate Sales Accounts found for DReF Demo Sequence to DReF Demo Sequence.
App2App Apple user 16 minutes ago

Linked Duplicate Sales Accounts found for CIMS INDUSTRIES INC to CIMS INDUSTRIES INC.
App2App Apple user 16 minutes ago

Linked Duplicate Sales Accounts found for RANELAGH SCHOOL to RANELAGH SCHOOL.
App2App Apple user 17 minutes ago

Linked Duplicate Sales Accounts found for PerfSalesAccount_contacts_11589566315 to PerfSalesAccount_contacts_11589566315.
App2App Apple user 18 minutes ago

Linked Duplicate Sales Accounts found for Integration test CRM - 5 to Integration test CRM - 5.
App2App Apple user 19 minutes ago

Linked Duplicate Sales Accounts found for Navtej Sidhu Sole Proprietor to Navtej Sidhu Sole Proprietor.
App2App Apple user 19 minutes ago

Linked Duplicate Sales Accounts found for MEDICAL APPLICATIONS LIMITED to MEDICAL APPLICATIONS LIMITED.
App2App Apple user 20 minutes ago

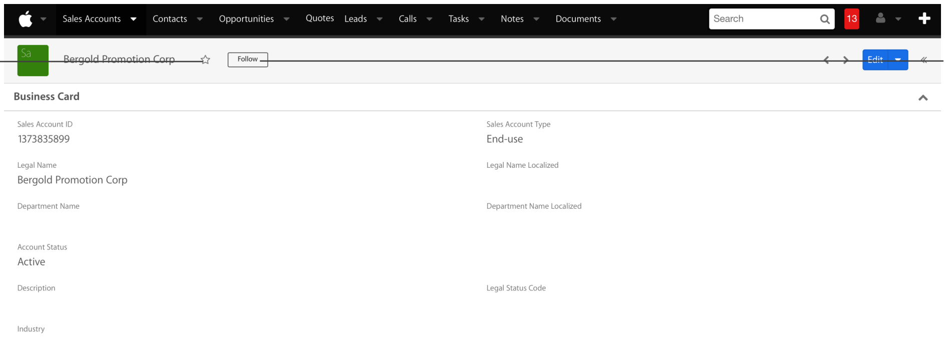
View a list of recent activity for the categories you are viewing such as Sales Accounts in this example

Favorite and Follow

Apple CRM has functionality to Favorite items such as a Sales Account or Opportunity to make it easier to find and filter to a set of items like a list of Sales Accounts that are most relevant to you and your team.

In addition, you can Follow certain items like a Sales Account or Opportunity that will bring activity for that item into your Activity Stream. Below, you will find where in a Sales Account you can Favorite and or Follow a Sales Account record. This functionality works similarly across the Detail view in other modules that can be Favorited or Followed.

Favorite an item by clicking the star icon


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
13
Sa
Bergold Promotion Corp
Follow
Edit
Business Card

Sales Account ID
1373835899

Sales Account Type
End-use

Legal Name
Bergold Promotion Corp

Legal Name Localized

Department Name

Department Name Localized

Account Status
Active

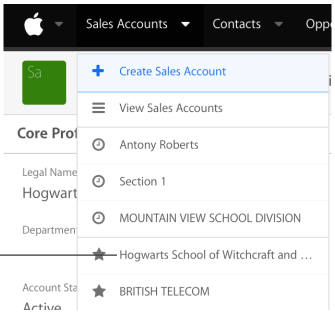
Description

Legal Status Code

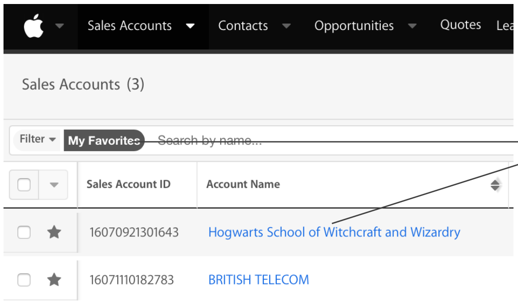
Industry

Follow an item by clicking the Follow button

Once you Favorite an item such as a Sales Account in this example, it will appear when you click the Sales Account module drop down from the tool bar. And appear when you Filter your list of Sales Accounts to favorites.


Sales Accounts
Contacts
Opp
Sa
Core Prof
Legal Name
Hogwart
Departmen
Account Sta
Active
Create Sales Account
View Sales Accounts
Antony Roberts
Section 1
MOUNTAIN VIEW SCHOOL DIVISION
Hogwarts School of Witchcraft and …
BRITISH TELECOM

See Favorite Sales Accounts from the Sales Account module drop down


Sales Accounts
Contacts
Opportunities
Quotes
Lea
Sales Accounts (3)
Filter
My Favorites
Search by name...

Sales Account ID	Account Name
16070921301643	Hogwarts School of Witchcraft and Wizardry
16071110182783	BRITISH TELECOM

Once Filtered to My Favorites, a list of Favorited Sales Accounts will appear

Sales Accounts

Sales Accounts capture the details of the businesses and organizations Apple works with and are the key record of customer information. As you build your relationship with a customer, their Sales Account will be the hub to document all related activities.

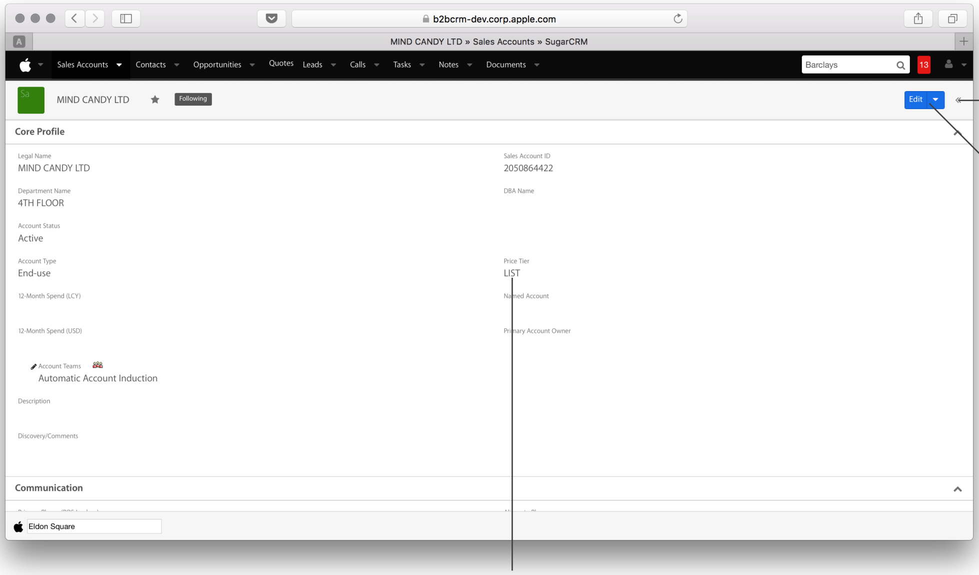
Overview

Sales Accounts are individual customer records where all activity including Contacts, Opportunities, and Quotes are documented. Sales Accounts will be accessible across all Apple Direct Channels (Retail, Enterprise and Education) and customer activity across these channels will be recorded in a single Sales Account for each customer once those teams begin using Apple CRM.Sales Account Detail View

The Sales Account Detail view has all the records and information concerning a specific Customer.

Core Profile

The Core Profile section includes primary customer details at the top of the Sales Account record. For example, the customer's Price Tier is listed in the Price Tier field and in the Price Tier sub-panel below the Core Profile. 12 Month Spend is associated with the individual Sales Account and does not include any child or parent Sales Account relationships. This example shows how information on Sales Accounts is summarized in the Core Profile and receives expanded details in the Sub Panels.



Legal Name
MIND CANDY LTD

Sales Account ID
2050864422

Department Name
4TH FLOOR

DBA Name

Account Status
Active

Account Type
End-use

Price Tier
LIST

12-Month Spend (LCY)

Named Account

12-Month Spend (USD)

Primary Account Owner

Account Teams
Automatic Account Induction

Description

Discovery/Comments

Core Profile section of the Sales Account Detail view

Select the double arrow to show the Intelligence Panel

The Edit button is used to update information in the Core Profile. The drop down menu next to Edit is used to access Actions such as Find Duplicates, Historical Summary and the Change Log to see when fields in the Core Profile were updated

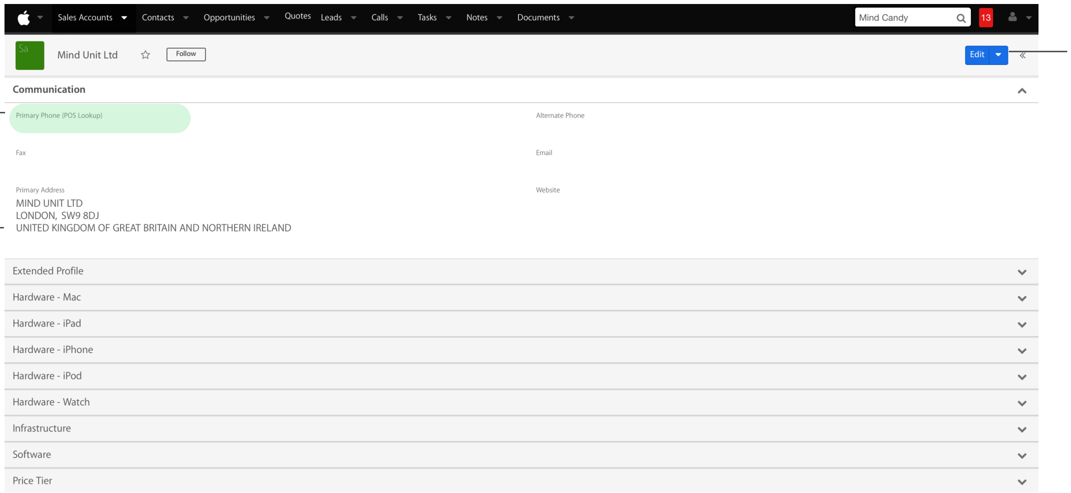
View a customer's Price Tier in the Core Profile or in the Price Tier sub-panel below the Core Profile. The Price Tier can be edited only by the Engagement Team

Communication Profile

The Communication Profile summarizes the primary contact information for the Sales Account including the **Primary Phone (POS Lookup)** field. This field can be used in addition to QR Code lookup at EasyPay to always ensure matching during a customer's in store visits.

To update information in the Communication sub-panel including the Primary Phone (POS Lookup) field, select the Edit button.

When entering the Primary Phone, make sure the full area code is entered or the SAP CRM store will not launch. The area code for each country will not be automatically recognized.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Mind Candy
13
Sa
Mind Unit Ltd
Follow
Edit

Communication

Primary Phone (POS Lookup)

Alternate Phone

Fax

Email

Primary Address
MIND UNIT LTD
LONDON, SW9 8DJ
UNITED KINGDOM OF GREAT BRITAIN AND NORTHERN IRELAND

Website

- Extended Profile
- Hardware - Mac
- Hardware - iPad
- Hardware - iPhone
- Hardware - iPod
- Hardware - Watch
- Infrastructure
- Software
- Price Tier

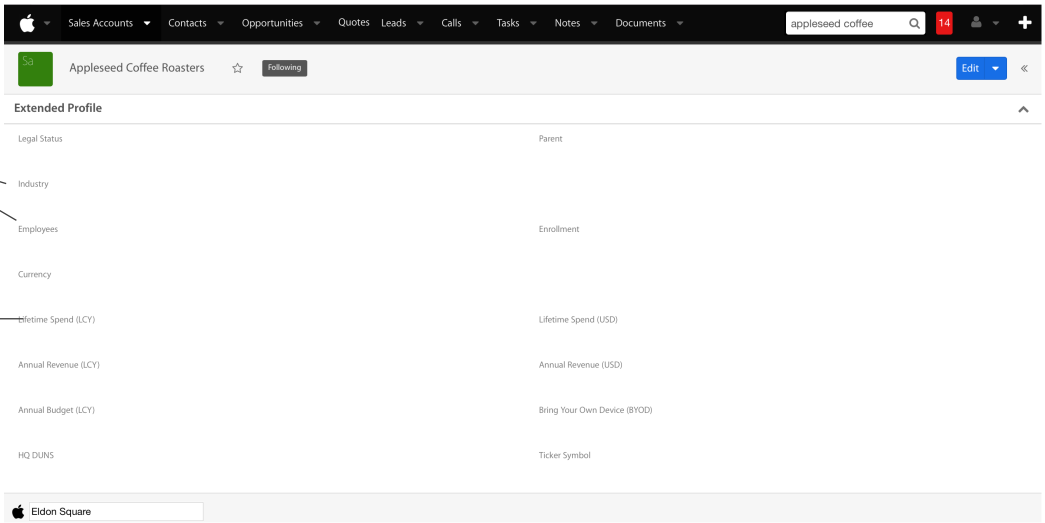
Primary Phone Number (POS Lookup) field to easily find and link Sales Accounts to POS transactions in EasyPay

Select Edit to update fields on the Communication sub-panel

Additional sub-panels with more information on the Sales Account

Extended Profile

The Extended Profile has additional information such as the customer's Lifetime Spend in Local Currency (LCY) and United States Dollars (USD), and Tax Status information. Note that Joint Venture information does not auto-populate but can be manually updated.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
appleseed coffee
14
Sa
Appleseed Coffee Roasters
Following
Edit
Eldon Square

Extended Profile

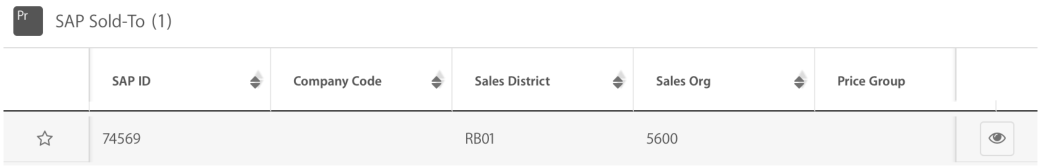
Legal Status	Parent
Industry	
Employees	Enrollment
Currency	
Lifetime Spend (LCY)	Lifetime Spend (USD)
Annual Revenue (LCY)	Annual Revenue (USD)
Annual Budget (LCY)	Bring Your Own Device (BYOD)
HQ DUNS	Ticker Symbol

If known, information such as Industry or number of employees can be entered by the user or will be populated from other Apple systems

View a customer's lifetime spend in Local Currency (LCY) and United States Dollars (USD)

SAP Sold-To Sub-Panel

You can find the SAP Sold-To number for a Sales Account by locating the SAP Sold-To sub-panel. See the Viewing an SAP Sold-To in a Sales Account section in this Guide for more details.



Pr SAP Sold-To (1)

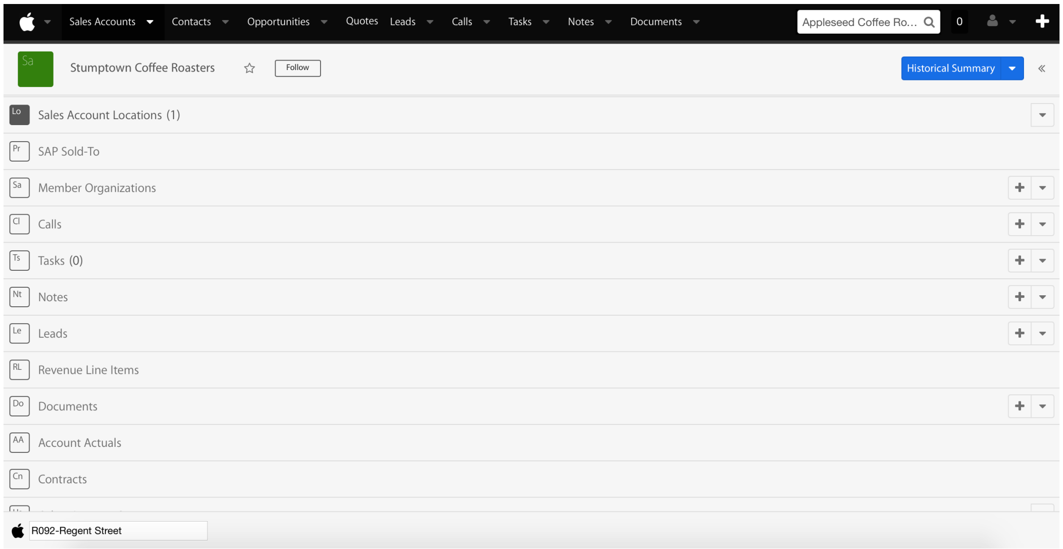
	SAP ID	Company Code	Sales District	Sales Org	Price Group	
☆	74569		RB01	5600		👁

Additional Sub-Panels

Each Sales Account has additional sub-panels below the Core Profile and Communication sections for each module of Apple CRM which are covered throughout this guide. Each sub-panel can be expanded or collapsed by clicking the down arrow on the far right.

Many of these sub-panels have information that can be edited by the user. If the ✎ icon appears when hovering over a field, that information can be edited by the user.

All the sub-panels can be moved and reordered per each users preference to display as they see fit. For example some users may want the sub-panels to be reordered to better enable their UI navigation.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Appleseed Coffee Ro...
0
Follow
Historical Summary
R092-Regent Street

Sa Stumptown Coffee Roasters

- Lo Sales Account Locations (1)
- Pr SAP Sold-To
- Sa Member Organizations
- Cl Calls
- Ts Tasks (0)
- Nt Notes
- Le Leads
- RL Revenue Line Items
- Do Documents
- AA Account Actuals
- Cn Contracts

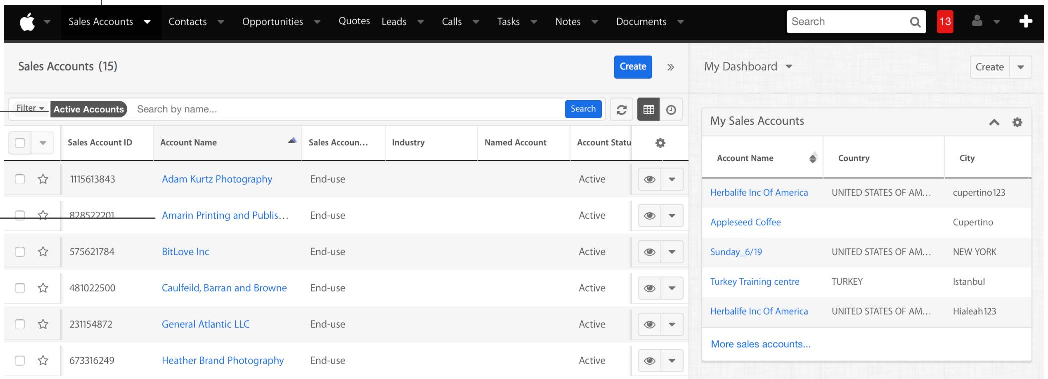
Finding Sales Accounts using Filter Search

1. Click the Sales Accounts module in the Toolbar.
2. In the Filter Search bar, type the name of the Sales Account you are searching for. Or, Filter using a more refined search. To learn more about Filtering, see the Create a Filter section in this guide.
3. Select the Sales Account you are looking for to open the Sales Account page.

Sales Account button on the Toolbar.

Filter Search Bar used to narrow search to specific Sales Account

Click an individual Sales Account to view that specific customer record


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
13
Create
My Dashboard
Create
Filter
Active Accounts
Search by name...
Search

Sales Accounts (15)

Sales Account ID	Account Name	Sales Accoun...	Industry	Named Account	Account Statu
1115613843	Adam Kurtz Photography	End-use			Active
828522201	Amarin Printing and Publis…	End-use			Active
575621784	BitLove Inc	End-use			Active
481022500	Caulfeild, Barran and Browne	End-use			Active
231154872	General Atlantic LLC	End-use			Active
673316249	Heather Brand Photography	End-use			Active

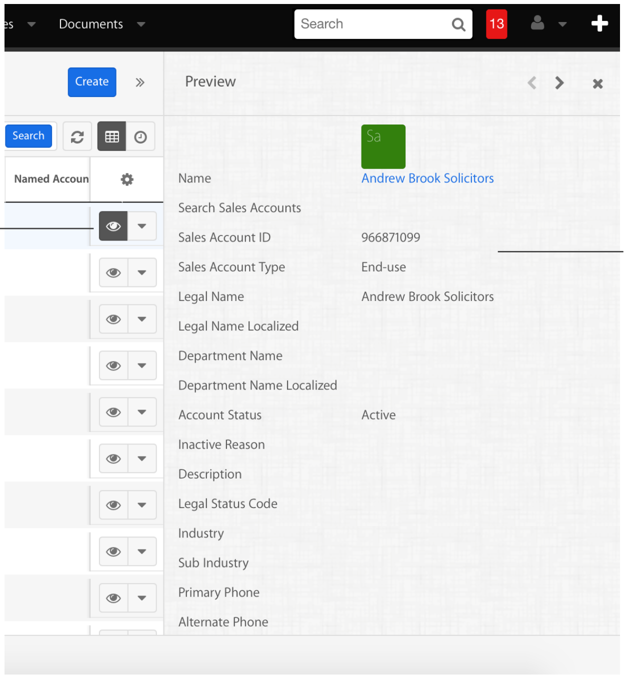
My Sales Accounts

Account Name	Country	City
Herbalife Inc Of America	UNITED STATES OF AM…	cupertino123
Appleseed Coffee		Cupertino
Sunday_6/19	UNITED STATES OF AM…	NEW YORK
Turkey Training centre	TURKEY	Istanbul
Herbalife Inc Of America	UNITED STATES OF AM…	Hialeah123

More sales accounts...

4. To preview a Sales Account from the List view without navigating away from your list, click the 👁 button next to a Sales Account to preview the Sales Account in the Intelligence Pane on the right.

Preview Sales Account button


Documents
Search
13
Create
Search
Named Accoun
Preview
Sa

Preview of Sales Account in the Intelligence Pane

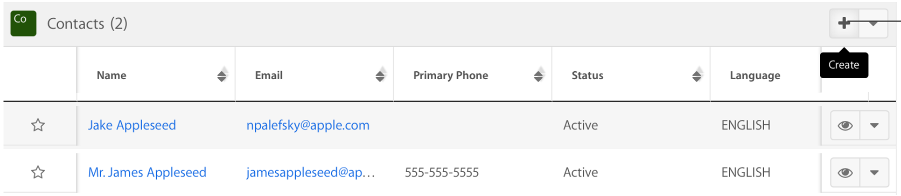
Name	Andrew Brook Solicitors
Search Sales Accounts	
Sales Account ID	966871099
Sales Account Type	End-use
Legal Name	Andrew Brook Solicitors
Legal Name Localized	
Department Name	
Department Name Localized	
Account Status	Active
Inactive Reason	
Description	
Legal Status Code	
Industry	
Sub Industry	
Primary Phone	
Alternate Phone	

Co

Adding a New Contact to a Sales Account

Contacts are individual employees of the company who are points of contact for the Sales Account. Maintaining up to date information for each Contact under a Sales Account is important to make sure teams can effectively engage the Customer.

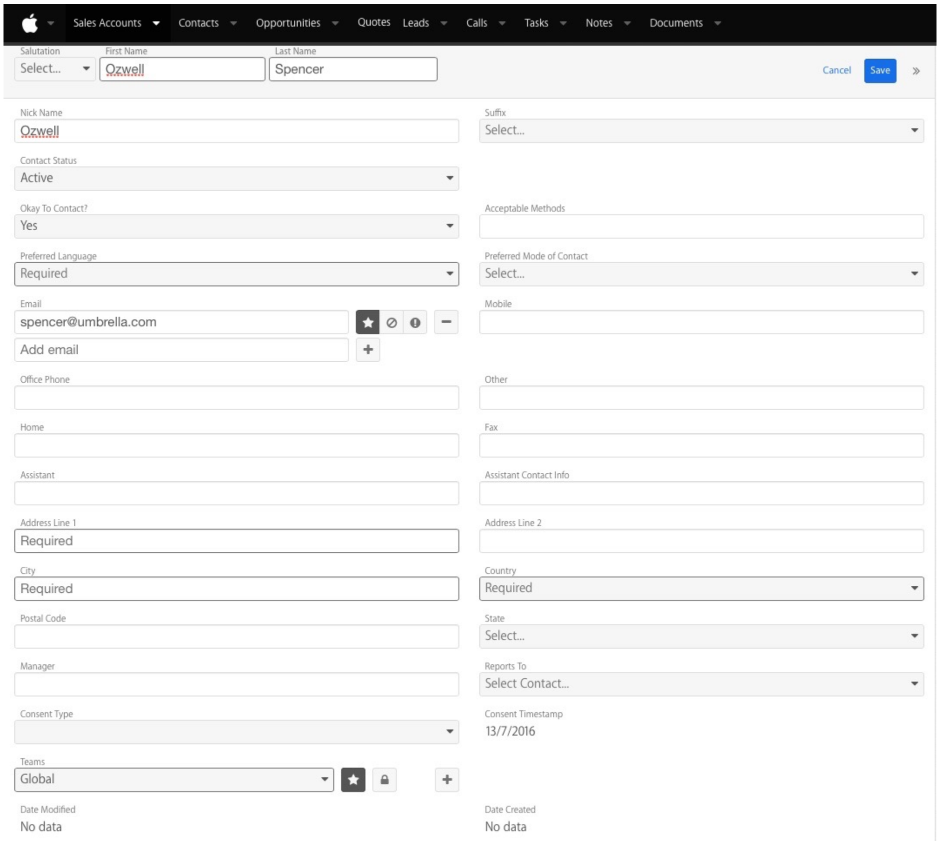
1. Click the Sales Account button on the Toolbar.
2. Filter to the Sales Account you are looking for. Click the Sales Account to open the customer's record. Or, search for a Sales Account using Global Search.
3. Scroll down to the Contacts sub-panel and click the Create Contact icon (+).



	Name	Email	Primary Phone	Status	Language
☆	Jake Appleseed	npalefsky@apple.com		Active	ENGLISH
☆	Mr. James Appleseed	jamesappleseed@ap…	555-555-5555	Active	ENGLISH

Add Contact button used to add a new Contact to a Sales Account.

4. Complete all of the required fields as indicated in Apple CRM. Apple CRM will indicate if any of the required fields are missing or invalid.



Salutation: Select...
First Name: Ozwell
Last Name: Spencer
Nick Name: Ozwell
Suffix: Select...
Contact Status: Active
Okay To Contact?: Yes
Acceptable Methods:
Preferred Language: Required
Preferred Mode of Contact: Select...
Email: spencer@umbrella.com
Add email
Mobile:
Office Phone:
Other:
Home:
Fax:
Assistant:
Assistant Contact Info:
Address Line 1: Required
Address Line 2:
City: Required
Country: Required
Postal Code:
State: Select...
Manager:
Reports To: Select Contact...
Consent Type:
Consent Timestamp: 13/7/2016
Teams: Global
Date Modified: No data
Date Created: No data

5. Once completed, click Save.
6. If a duplicate Contact is found, Apple CRM will show a warning. To avoid setting up duplicate Contacts, make sure the new Contact is not already in Apple CRM.

Updating a Sales Accounts

Automated updates to Sales Account information

The approach to data accuracy in Apple CRM will result in new workflows and processes to deliver an improved overall experience to our customers. In certain circumstances information on the Sales Account may be provided by other Apple systems. The Master Data Management Hub (MDM Hub) collects information from these various Apple Systems to enrich Sales Accounts in Apple CRM. Information provided by the MDM Hub cannot be edited within AppleCRM.

At times, the MDM Hub will add or update information within a Sales Account to make sure customer data is up to date. Some examples of this Sales Account information that will not be editable by the User include:

- Company Name
- Primary Address
- Doing Business As (DBA) Name

If you encounter information on a Sales Account that cannot be edited, this information was provided by the MDM Hub. The Master Data Management Team is the primary governing body for master data related to Apple CRM. To request changes to information, reach out to the Master Data Management Team at master_data@apple.com with the following information:

- Apple CRM Sales Account ID
- Apple CRM Sales Account Name
- Information to be updated
- Reason for information change
- If you are not the Primary Account Owner, carbon copy (CC) the Primary Account Owner on the email

⚠ *APPLE CRM & ENGAGE INFORMATION SHARING* Data entered in an Apple CRM Sales Account will not sync to an Engage Company Profile. Linked sales to Engage Company Profiles in Apple CRM stores will reflect revenue in both Apple CRM and Engage.

Viewing Apple Customer Accounts — SAP Sold-To

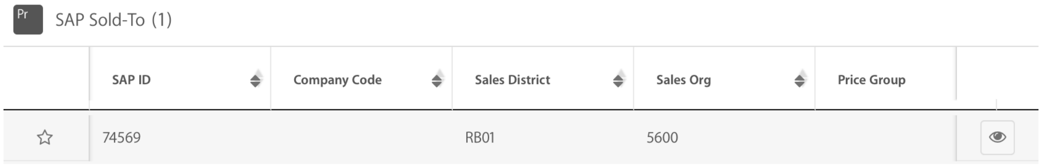
Business Customers that wish to use value add services such as a Terms Account, Custom Online Store, the Device Enrollment Program, and others will need an Apple Customer Account (SAP Sold To). Each Sales Account is eligible for a single Apple Customer Account. There are two types of Customer Accounts — Terms and Prepaid. Each Apple Customer Account created receives an SAP Sold-To number which is visible in Apple CRM.

A Terms Account is an Apple Customer Account where Apple extends the customer credit. Customers provide Purchase Orders to place orders against their Terms Account and have 30 days to pay off an open balance.

A Prepaid Sold-To Account is created when a customer does not need credit with Apple but needs an SAP-Sold to take advantage of services such as a Custom Online Store or the Device Enrollment Program.

To view an SAP Sold-To Account, follow these steps:

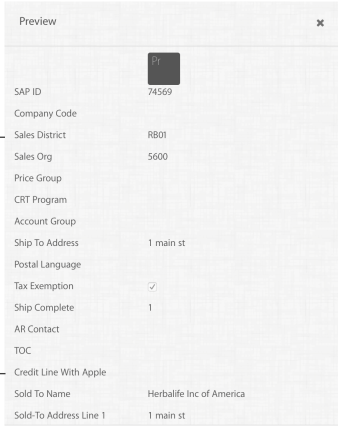
1. In the Sales Account Detail view, scroll down to the SAP-Sold To sub-panel.
2. Within the sub-panel, you can scroll to the right to view key information about their Apple Customer Account including Sales District, Credit Limit, and Tax Exemption status.


SAP Sold-To (1)

	SAP ID	Company Code	Sales District	Sales Org	Price Group	
☆	74569		RB01	5600		👁

CREDIT LIMIT IN APPLE CRM Note that the Credit Limit shown in Apple CRM is based on the information of record from the Apple Customer Account regarding the customer's overall credit line. The Credit Limit does not reflect the customer's current credit status such as open balance and should not be used to advise the customer on their credit status. Ensure you follow the Purchase Order approval steps before completing an order on a customer's Terms Account.

3. You can also view this information in the Intelligence Pane.
4. The Intelligence pane will appear with information about the customer's SAP Sold-To. You can scroll down within the Intelligence Pane to view more information about the SAP Sold-To.


Preview

SAP ID	74569
Company Code	
Sales District	RB01
Sales Org	5600
Price Group	
CRT Program	
Account Group	
Ship To Address	1 main st
Postal Language	
Tax Exemption	✓
Ship Complete	1
AR Contact	
TOC	
Credit Line With Apple	
Sold To Name	Herbalife Inc of America
Sold-To Address Line 1	1 main st

View Sales District of the Customer Account

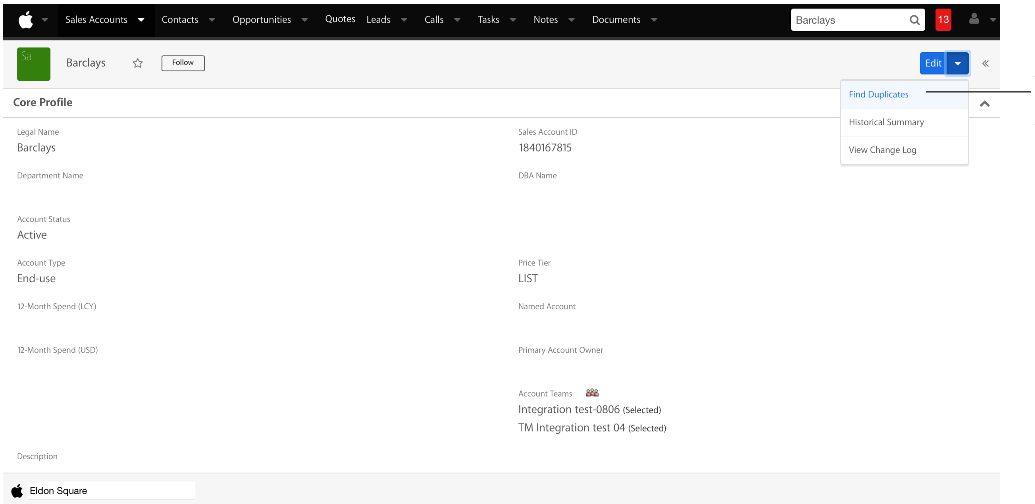
View Credit Line if the customer has a Terms Account with Apple

Finding Duplicate Sales Accounts

To maintain the quality of our data and make sure there is a single Sales Account for each Company we work with, Apple CRM has functionality to locate duplicates for a Sales Account. Use this functionality to identify Sales Accounts that should be merged into a single Sales Account.

1. Find the Sales Account to search for duplicates against.

2. In the Sales Account record view, select the arrow next to the Edit button.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Barclays
13
Sa
Barclays
Follow
Edit
Find Duplicates
Historical Summary
View Change Log
Core Profile
Eldon Square

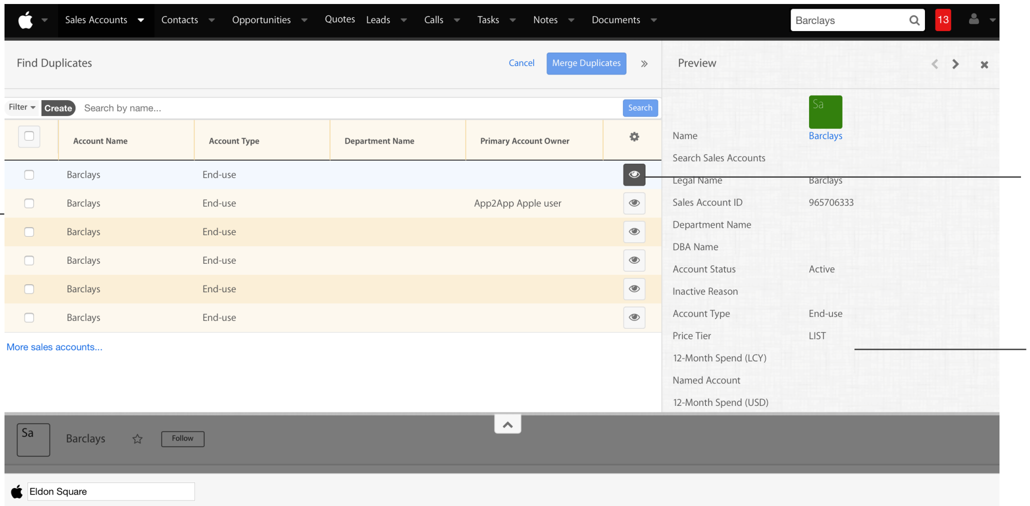
Legal Name: Barclays
Sales Account ID: 1840167815
Department Name:
DBA Name:
Account Status: Active
Account Type: End-use
Price Tier: LIST
12-Month Spend (LCY):
Named Account:
12-Month Spend (USD):
Primary Account Owner:
Account Teams: Integration test-0806 (Selected)
TM Integration test 04 (Selected)
Description:

Select Find Duplicates from the drop down menu next to Edit in the Sales Account record view

3. Select Find Duplicates and Apple CRM will search for duplicate Sales Accounts.

4. If duplicates are found, a list of duplicates will be shown. To preview more information about a duplicate, select the 👁 button next to the duplicate. This will show more information about that Sales Account in the Intelligence Pane.

5. Users will not have the ability to Merge duplicates through Apple CRM. See the Merging Sales Account section in this guide to request Sales Accounts be merged.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Barclays
13
Find Duplicates
Cancel
Merge Duplicates
Filter
Create
Search by name...
Search
More sales accounts...
Preview
Sa
Barclays
Follow
Eldon Square

☐	Account Name	Account Type	Department Name	Primary Account Owner	
☐	Barclays	End-use			👁
☐	Barclays	End-use		App2App Apple user	👁
☐	Barclays	End-use			👁
☐	Barclays	End-use			👁
☐	Barclays	End-use			👁
☐	Barclays	End-use			👁

Name	Barclays
Search Sales Accounts	
Legal Name	Barclays
Sales Account ID	965706333
Department Name	
DBA Name	
Account Status	Active
Inactive Reason	
Account Type	End-use
Price Tier	LIST
12-Month Spend (LCY)	
Named Account	
12-Month Spend (USD)	

Apple CRM will present a list view of potential duplicates

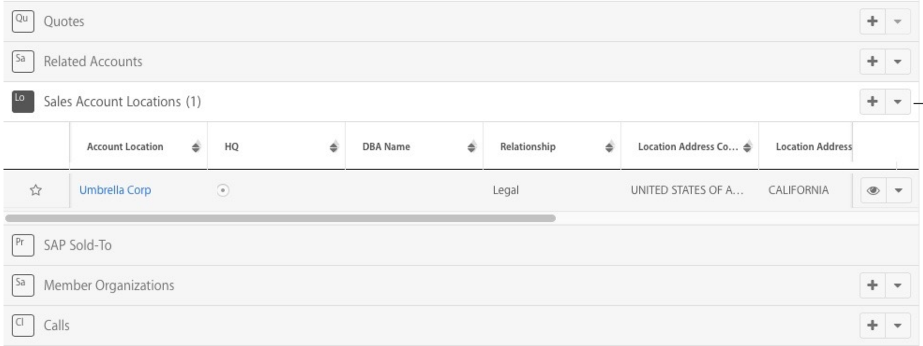
Select the Preview button to preview the Sales Account in the Intelligence Pane

More information about the Sales Account will be presented in the Intelligence Pane

Add or Update a Sales Account Location

A Sales Account location is the customer's primary location (headquarters) and satellite or subsidiary locations.

1. Before adding or updating a Sales Account location, make sure the address entered is a valid business address.
2. Click the Sales Account button on the Toolbar.
3. Filter to the Sales Account you are looking for. Click the Sales Account to open the customer's record.
4. Scroll down to Sales Account Locations. Click the Add Location icon (+).


Qu
Quotes
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Related Accounts
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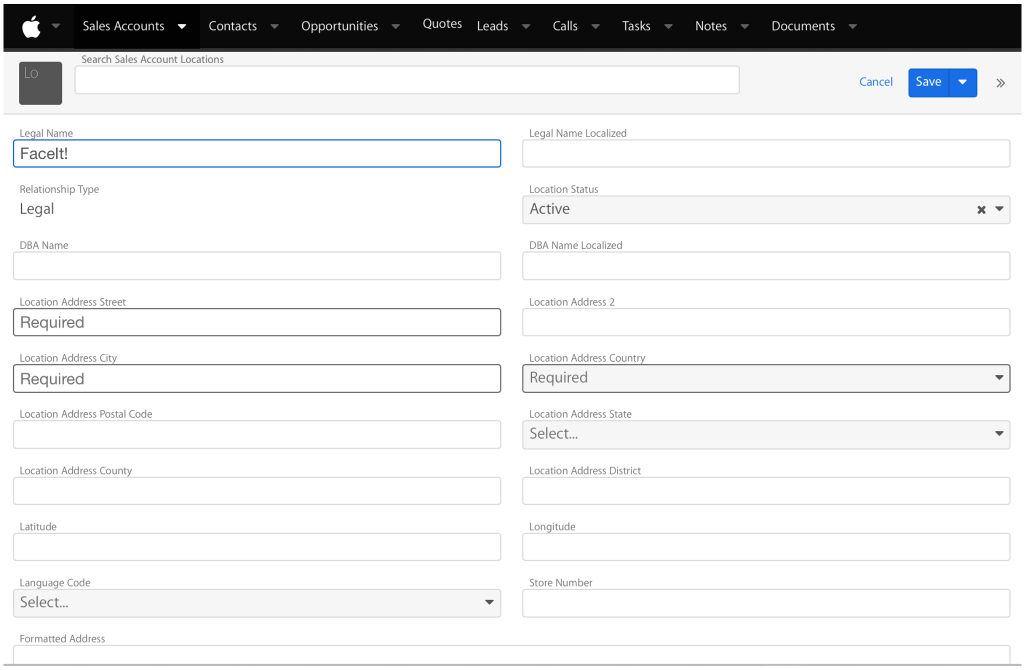
Sales Account Locations (1)
Pr
SAP Sold-To
Sa
Member Organizations
Cl
Calls

	Account Location	HQ	DBA Name	Relationship	Location Address Co...	Location Address
☆	Umbrella Corp	○		Legal	UNITED STATES OF A...	CALIFORNIA

Add Location button used to add a new location to a Sales Account

5. Complete the required fields. Apple CRM will indicate if any of the required fields are missing or invalid.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
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Documents
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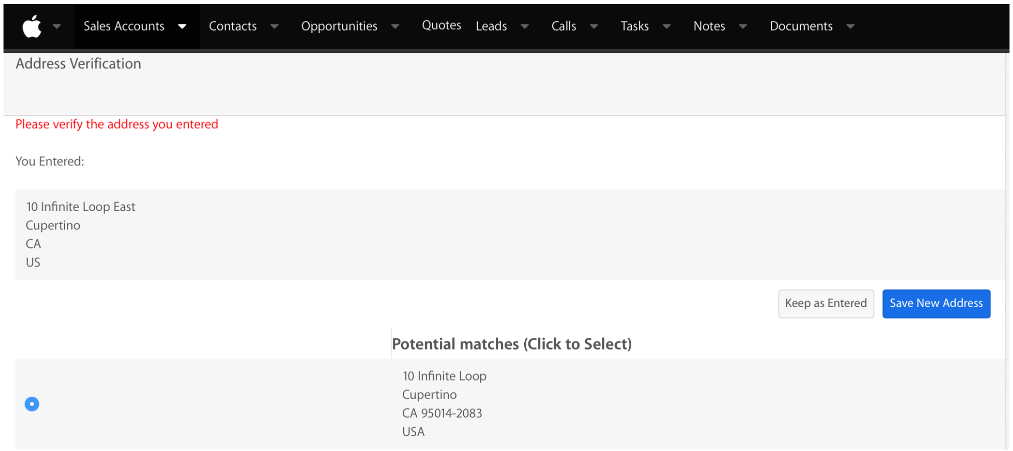
Search Sales Account Locations
Cancel
Save
»

Legal Name: FaceIt!
Legal Name Localized:
Relationship Type: Legal
Location Status: Active
DBA Name:
DBA Name Localized:
Location Address Street: Required
Location Address 2:
Location Address City: Required
Location Address Country: Required
Location Address Postal Code:
Location Address State: Select...
Location Address County:
Location Address District:
Latitude:
Longitude:
Language Code: Select...
Store Number:
Formatted Address:

6. Click Save.

7. Apple CRM will validate the address entered. Click Save New Address to confirm the address selection or Keep as Entered to keep the address you entered.



Address Verification

Please verify the address you entered

You Entered:

10 Infinite Loop East
Cupertino
CA
US

Potential matches (Click to Select)

● 10 Infinite Loop
Cupertino
CA 95014-2083
USA

Merging Sales Accounts

You may find duplicate Sales Accounts in the CRM. To maintain the quality of our data, it is important to merge these into a single Sales Account to centralize customer activity in a single record. Merge requests are managed by the Master Data Management team.

1. Gather the following details of the duplicate Sales Accounts:
   - Primary Sales Account Apple CRM ID
   - Primary Sales Account Location (which of the addresses will be the headquarters)
   - Apple CRM ID(s) for Sales Account(s) to be merged into Primary Sales Account
   - Sales Account Name for Primary Sales Account and Sales Account(s) to be merged
   - Primary Account Team who will be the lead on the new merged Sales Account
2. Submit your request via email to master_data@apple.com.
3. Merges will be reviewed and the Sales Accounts will be merged if a duplicate is identified. The MDM team will connect with you if a duplicate cannot be identified or if there are further questions.
4. Each team on the Sales Account Team will receive a notification in Apple CRM when the merge is complete.

⚠ *MERGING RECORDS IN APPLE CRM* Merging records impacts multiple systems and teams which rely on CRM data to be curated through Data Governance Principles. Please send all requests to master_data@apple.com

Inactivating Sales Accounts

You may need to inactivate an out of date Sales Account. To maintain the quality of our data, these requests will be sent to and managed by the Master Data Management team.

> ⚠ *MAKING INACTIVATION REQUESTS* Inactivation requests must come from the Primary Owner on the Sales Account Team, if there is a Primary Owner. If you are not the Primary Owner on the Sales Account Team, partner with the Primary Owner for the inactivation request. Otherwise, the request must come from a member of the Sales Account Team if there is no Primary Owner.

1. Gather the following details of the duplicate Sales Accounts:
    - Sales Account Apple CRM ID
    - Sales Account Name
    - Reason for inactivation
2. Submit your request via email to master_data@apple.com.
3. Inactivation requests will be reviewed and the Sales Accounts will be inactivated if there is a valid need to inactivate the Sales Account.

Changing Primary Territory

You may wish to change the Primary Territory for a customer for a variety of reasons including if the customer moves locations and would like to work with a team close to their location or if you or another team becomes the Primary Account Owner. Changes to the Primary Territory must be done by the MDM Team in the Territory Management system.

To request changes to the Primary Territory for a Sales Account, reach out to master_data@apple.com with the following:

- Sales Account Apple CRM ID
- Sales Account Name
- Territory to be removed from Primary Territory
- Territory to be added to Primary Territory
- Reason for Change
- Carbon copy (CC) the Team from the Territory being removed on the email

Account Team

Apple CRM will eventually allow multiple Apple Direct Teams (Retail, Enterprise and Education) to collaborate on a single Sales Account. The Account Team may be made up of the main sales contacts across multiple Apple Direct teams.

Members of the Account Team have the ability to update fields within the Sales Account and Create Sales Account Locations, this editing ability is not available to non-Account Team members. All Sales Teams users of the tool can create Opportunities and orders against Sales Accounts in Apple CRM.

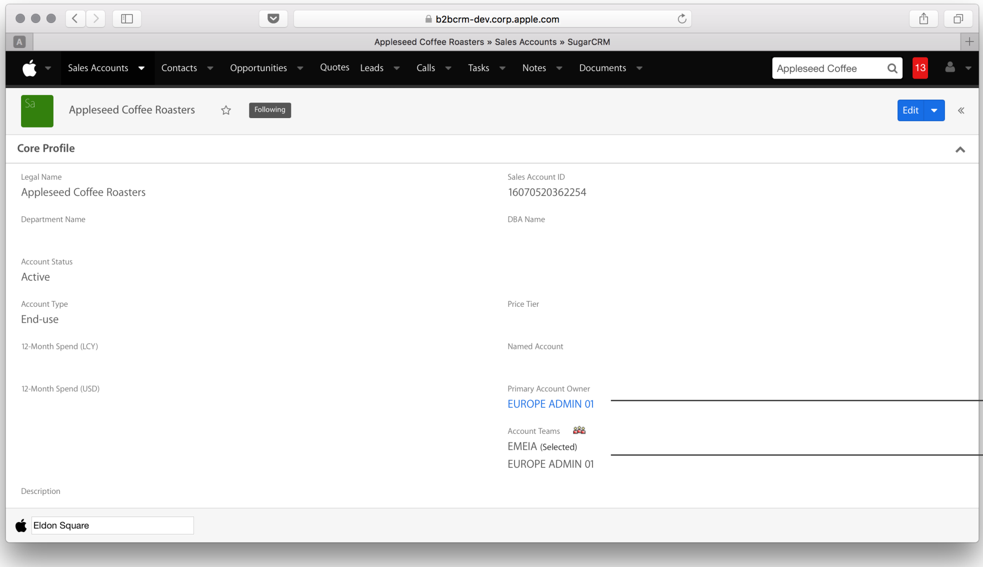
Primary Account Owner

Each Sales Account will have a Primary Account Owner who leads the relationship with the customer. The Primary Account Owner is designated in the Primary Account Owner Field in the Core Profile.

Viewing an Account Team

1. When viewing a Sales Account, find the Show More section and click the down arrow to reveal this section.

2. Members of the current Account Team are listed in the Account Teams section of the Core Profile.


b2bcrm-dev.corp.apple.com
Appleseed Coffee Roasters » Sales Accounts » SugarCRM
Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Appleseed Coffee
13
Sa
Appleseed Coffee Roasters
Following
Edit
Core Profile
Eldon Square

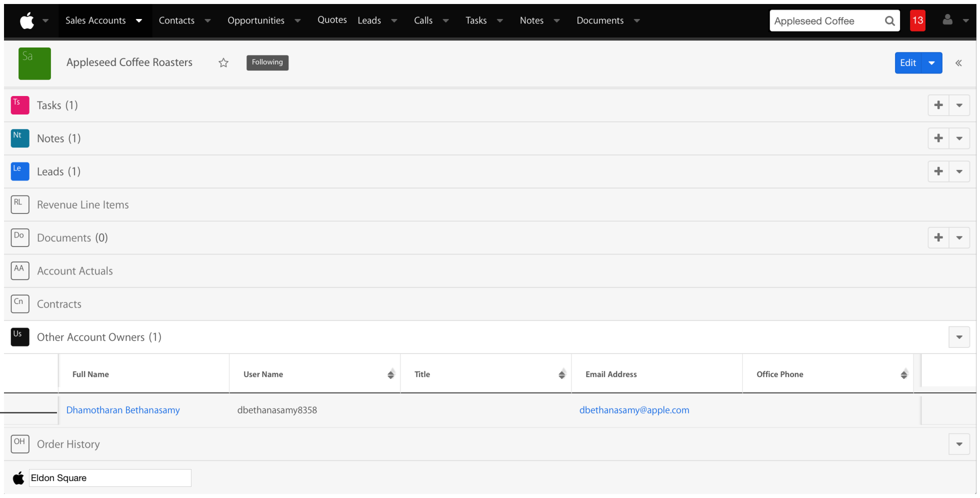
Legal Name: Appleseed Coffee Roasters
Sales Account ID: 16070520362254
Department Name:
DBA Name:
Account Status: Active
Account Type: End-use
Price Tier:
12-Month Spend (LCY):
Named Account:
12-Month Spend (USD):
Primary Account Owner: EUROPE ADMIN 01
Account Teams: EMEIA (Selected), EUROPE ADMIN 01
Description:

View the Primary Account Owner here

View members of the Account team here

Other Account Owners

Individual members of the Account Team can be listed as Account Owners in the Account Owner sub-panel of a Sales Account. Viewing other Account Owners provides visibility to the individual members of an Account Team such as an individual Business Expert from a Retail Store who are collaborating on a Sales Account.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Cn
Contracts
Us
Other Account Owners (1)
OH
Order History
Eldon Square

Full Name	User Name	Title	Email Address	Office Phone
Dhamotharan Bethanasamy	dbethanasamy8358		dbethanasamy@apple.com	

View other Account Owners in the Other Account Owners sub-panel on a Sales Account

Changing members on an Account Team

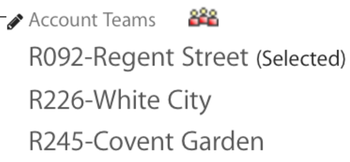
If you are not already on the Account Team list, reach out to a Retail Store on the Account Team list to be added to the Account Team.

If a Retail Store is not already on the Account Team list, reach out to master_data@apple.com with:

- Sales Account Apple CRM ID
- Sales Account Name
- Reason for being added to the Account Team

If you are a member of the Account Team, follow these steps to add a member to the Account Team list:

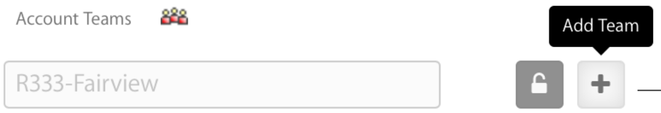
1. When viewing the list of Account Team members, hover over Account Teams until the pen icon appears and click to Edit the list and add Account Team members.


Account Teams

R092-Regent Street (Selected)
R226-White City
R245-Covent Garden

Hover over Account Teams until the pen icon appears

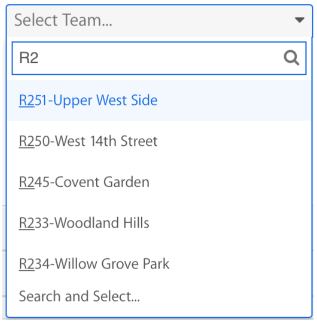
2. Scroll to the last Account Team member and select the + icon to add a new Account Team member.

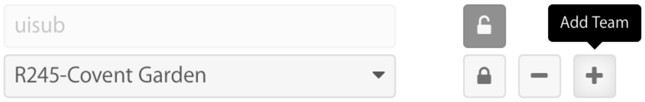

Account Teams
Add Team

R333-Fairview

Select the + icon to add a new Account Team member

3. Search for the Account Team and click the Account Team you would like to add.


Select Team...
R2
R251-Upper West Side
R250-West 14th Street
R245-Covent Garden
R233-Woodland Hills
R234-Willow Grove Park
Search and Select...

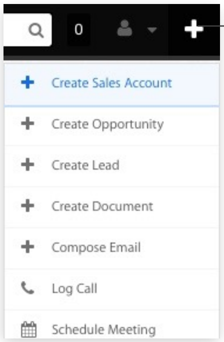


uisub
R245-Covent Garden

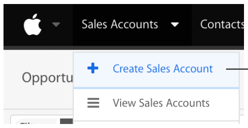
4. Once you select the Account Team, click the Add Team button.

Creating Sales Accounts (without a Lead)

1. Select the Quick Create (+) button in the Toolbar. Then choose Create Sales Account. Or, Create New Sales Account from the drop down menu next to Sales Accounts on the Toolbar.

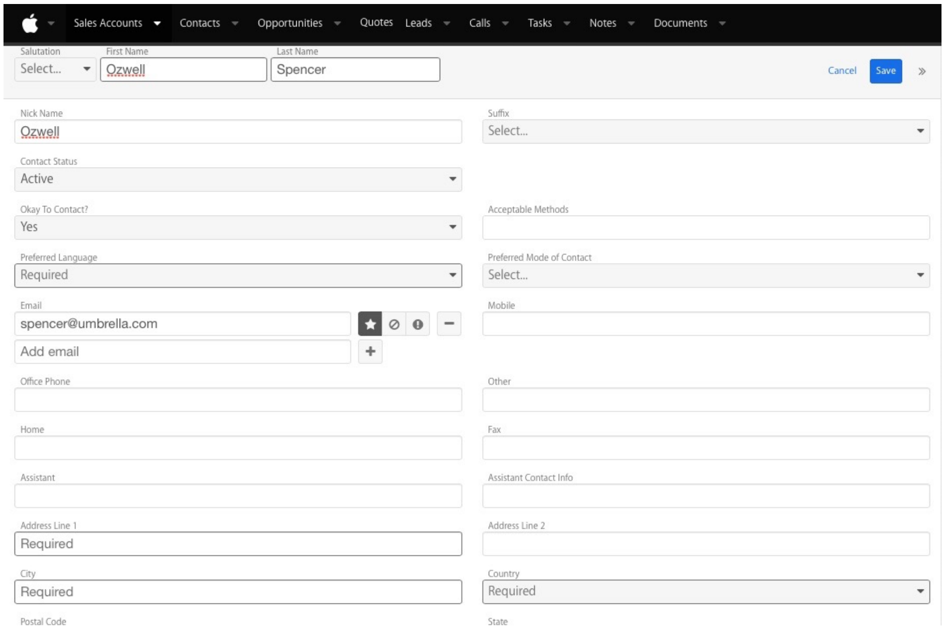

0
Create Sales Account
Create Opportunity
Create Lead
Create Document
Compose Email
Log Call
Schedule Meeting

Select the + icon to add a new Sales Account.


Sales Accounts
Contacts
Opportu
Create Sales Account
View Sales Accounts

Select Create Sales Account from the Sales Accounts drop down menu in the Toolbar

2. Complete the required fields in the Sales Account Details section. Apple CRM will indicate if any of the required fields are missing or invalid. It is important this data is accurate to make sure Sales Accounts are maintained with up to date customer information.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Cancel
Save

Salutation: Select...	First Name: Ozwell	Last Name: Spencer

Nick Name: Ozwell	Suffix: Select...
Contact Status: Active	
Okay To Contact?: Yes	Acceptable Methods:
Preferred Language: Required	Preferred Mode of Contact: Select...
Email: spencer@umbrella.com Add email	Mobile:
Office Phone:	Other:
Home:	Fax:
Assistant:	Assistant Contact Info:
Address Line 1: Required	Address Line 2:
City: Required	Country: Required
Postal Code	State

3. Click Show More to expand the fields and continue to fill out each field as required. For a new Sales Account, you are required to create at least one Sales Account Location. The first Sales Account Location you create will default to the Sales Account headquarters.

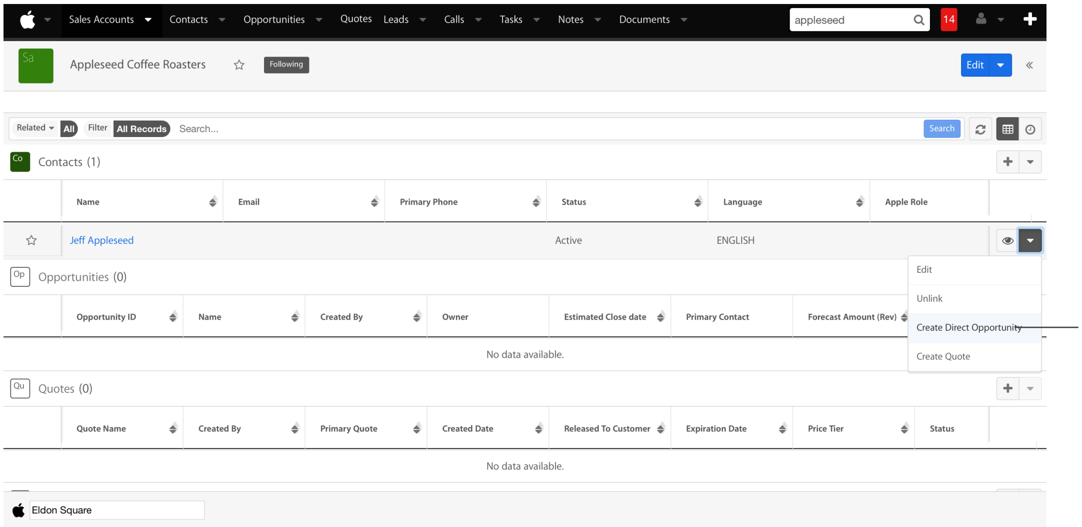
4. Once finished, click Save.

Opportunities and Quotes

In this section, you will learn how to use Opportunities and Quotes to create Pipeline and place direct ship (SSO) orders. An Opportunity contains multiple line item level Quotes. Quotes exist within an Opportunity and are line item level proposals created for an Opportunity.

Creating an Opportunity from a Sales Account

1. In the Sales Account record view, locate the Contacts sub-panel and select Create Direct Opportunity from the drop down menu on the far right of the Contact.


Sales Accounts
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Edit
Related
All
Filter
All Records
Search...
Search
Co
Contacts (1)
Op
Opportunities (0)
Qu
Quotes (0)
Edit
Unlink
Create Direct Opportunity
Create Quote
Eldon Square

Name	Email	Primary Phone	Status	Language	Apple Role
Jeff Appleseed			Active	ENGLISH	

Opportunity ID	Name	Created By	Owner	Estimated Close date	Primary Contact	Forecast Amount (Rev)
No data available.						

Quote Name	Created By	Primary Quote	Created Date	Released To Customer	Expiration Date	Price Tier	Status
No data available.							

Select the down arrow and select Create Direct Opportunity

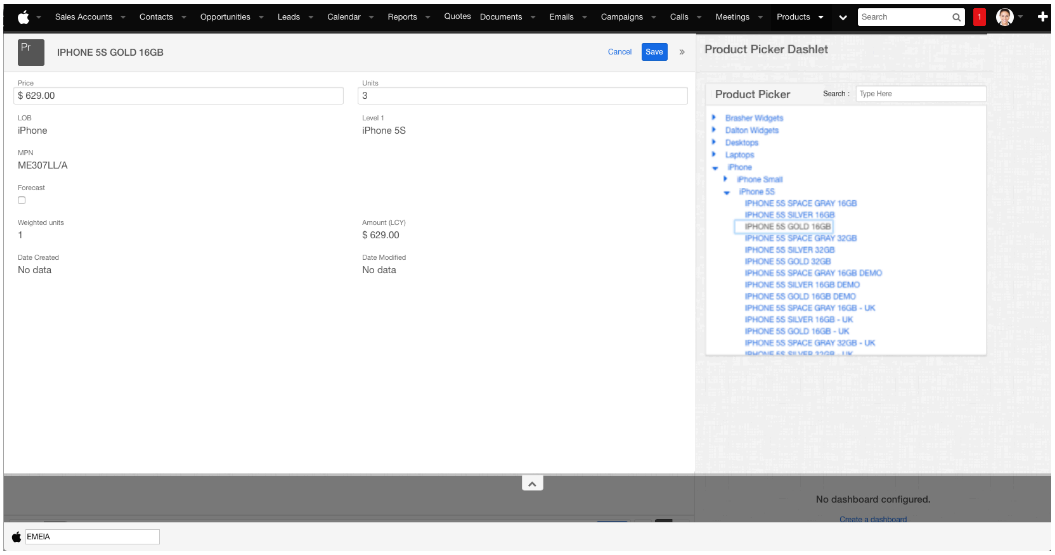
2. Complete the required fields in the Opportunity. Apple CRM will indicate if any of the required fields are missing or invalid.
3. Click the blue "Save and view" button in the top right corner.
4. On each new record be sure to confirm territory matches the intended Retail Store for Pipeline and eventual transaction revenue in sales reporting and dashboards.

Adding Products to an Opportunity using Product Picker

Apple CRM and Product Picker allows for a simple and easy way to create pipeline with products, potentially at an early stage in the sales process, when a customer facing Quote is not needed.

This will allow you to create Pipeline Opportunities in a lightweight way and create a Task or Call to follow up on that Opportunity with your customer at a later date.

1. Once you select Create Direct Opportunity and have completed the Opportunity details as shown in the previous section, you will be taken to the Opportunity Detail View. In the Fulfilled By section, select Fulfilled by Apple.
2. To add products, find the Products sub-panel. Select the '+' button on the far right.
3. The Product Picker dashlet will appear on the right hand side. Select the product or products to add to the Opportunity.


Sales Accounts
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Opportunities
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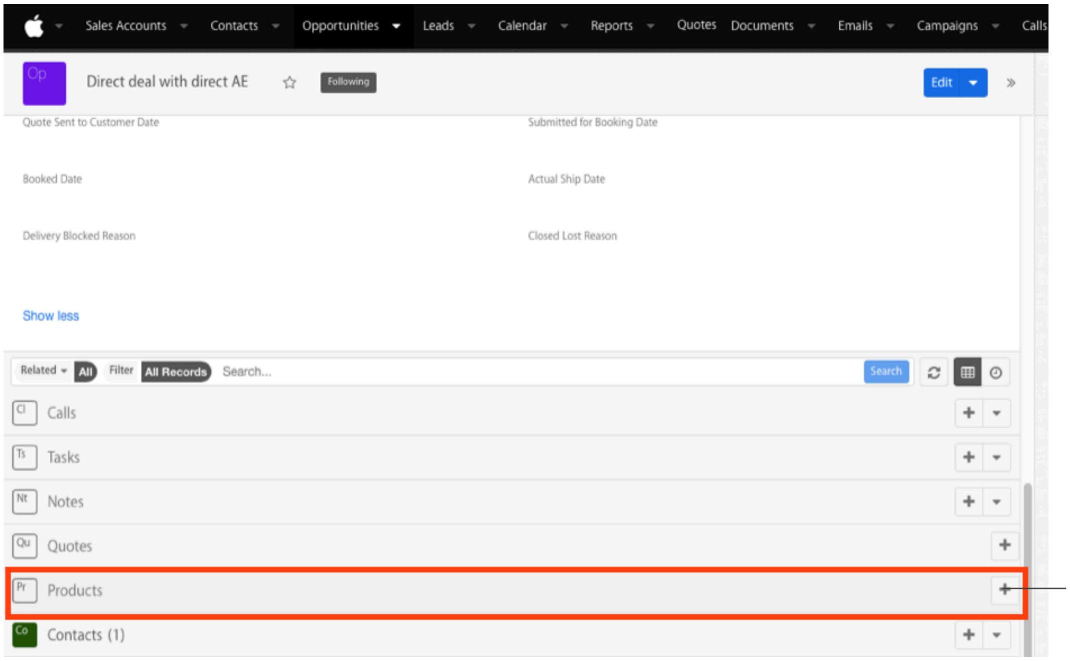
Campaigns
Calls
Meetings
Products
Search
1
Pr
Cancel
Save
Product Picker Dashlet
Product Picker
Search :
Type Here
Brasher Widgets
Dalton Widgets
Desktops
Laptops
iPhone
iPhone Small
iPhone 5S
IPHONE 5S SPACE GRAY 16GB
IPHONE 5S SILVER 16GB
IPHONE 5S GOLD 16GB
IPHONE 5S SPACE GRAY 32GB
IPHONE 5S SILVER 32GB
IPHONE 5S GOLD 32GB
IPHONE 5S SPACE GRAY 16GB DEMO
IPHONE 5S SILVER 16GB DEMO
IPHONE 5S GOLD 16GB DEMO
IPHONE 5S SPACE GRAY 16GB - UK
IPHONE 5S SILVER 16GB - UK
IPHONE 5S GOLD 16GB - UK
IPHONE 5S SPACE GRAY 32GB - UK
No dashboard configured.
Create a dashboard
EMEIA

IPHONE 5S GOLD 16GB

Price: $ 629.00
Units: 3
LOB: iPhone
Level 1: iPhone 5S
MPN: ME307LL/A
Forecast: ☐
Weighted units: 1
Amount (LCY): $ 629.00
Date Created: No data
Date Modified: No data


Sales Accounts
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Opportunities
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Documents
Emails
Campaigns
Calls
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Direct deal with direct AE
Following
Edit
Quote Sent to Customer Date
Submitted for Booking Date
Booked Date
Actual Ship Date
Delivery Blocked Reason
Closed Lost Reason
Show less
Related
All
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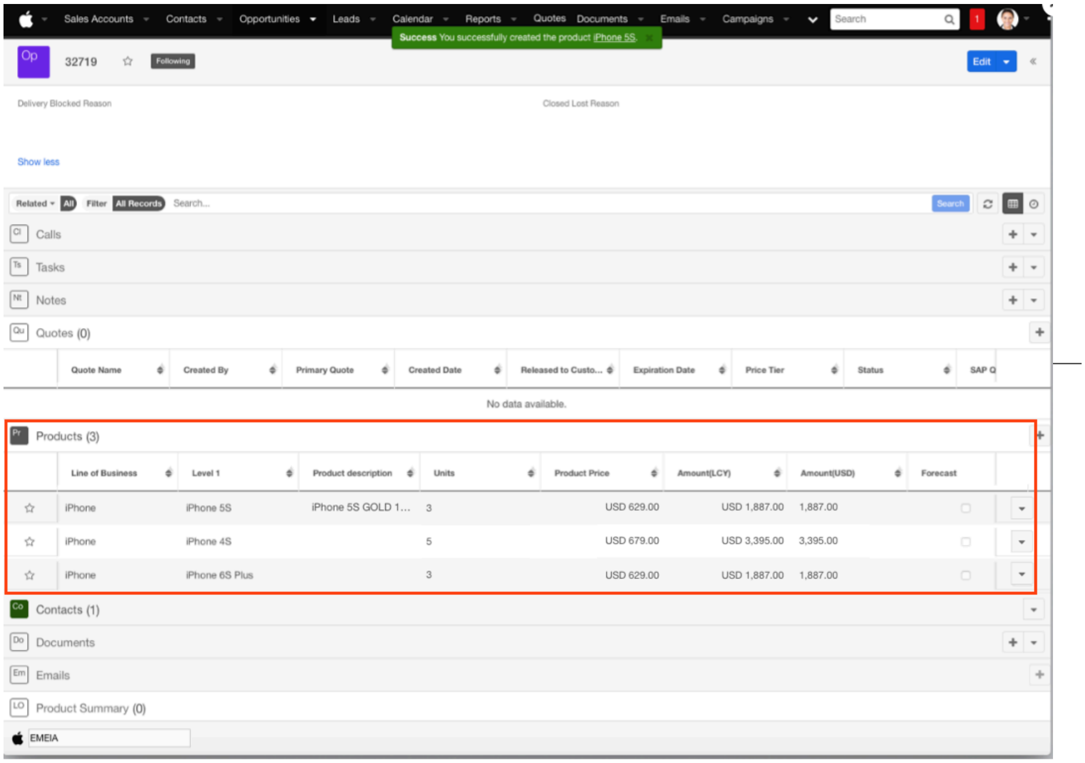
Contacts (1)

Select the '+' button to add products to the Opportunity


Sales Accounts
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Campaigns
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Following
Edit
Related
All
Filter
All Records
Search...
Search
Calls
Tasks
Notes
Contacts (1)
Documents
Emails
Product Summary (0)
EMEIA

Success You successfully created the product iPhone 5S.

32719

Delivery Blocked Reason

Closed Lost Reason

Show less

Quotes (0)

Quote Name	Created By	Primary Quote	Created Date	Released to Custo...	Expiration Date	Price Tier	Status	SAP Q

No data available.

Products (3)

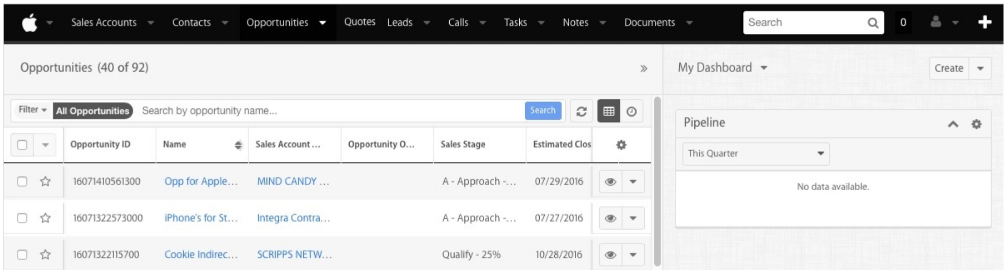
Line of Business	Level 1	Product description	Units	Product Price	Amount(LCY)	Amount(USD)	Forecast
iPhone	iPhone 5S	iPhone 5S GOLD 1...	3	USD 629.00	USD 1,887.00	1,887.00	☐
iPhone	iPhone 4S		5	USD 679.00	USD 3,395.00	3,395.00	☐
iPhone	iPhone 6S Plus		3	USD 629.00	USD 1,887.00	1,887.00	☐

Select a product from Product Picker here

4. Once a product is selected, it will appear in the Products sub-panel.

Finding Opportunities with Filter Search

1. From the List View in the "Opportunities" module, type a known Opportunity name or other search term in the Filter Search bar. This is the recommended way to search if you have more general information about or naming convention of the Opportunity as Global Search will return more broad results.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
My Dashboard
Create
Filter
All Opportunities
Search
Pipeline

Opportunities (40 of 92)

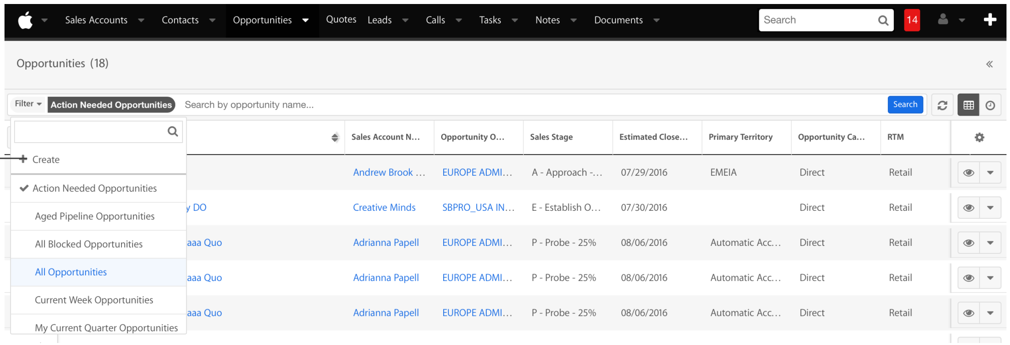
Search by opportunity name...

Opportunity ID	Name	Sales Account …	Opportunity O…	Sales Stage	Estimated Clos
16071410561300	Opp for Apple…	MIND CANDY …		A - Approach -…	07/29/2016
16071322573000	iPhone's for St…	Integra Contra…		A - Approach -…	07/27/2016
16071322115700	Cookie Indirec…	SCRIPPS NETW…		Qualify - 25%	10/28/2016

This Quarter

No data available.

2. If the Opportunity is not located through any pre-set Filter, click the drop down button next to Filter and select "Create". Use multiple filters to better refine the list of Opportunities. Refer to Creating a Filter in this guide for details on how to use the Filter function.

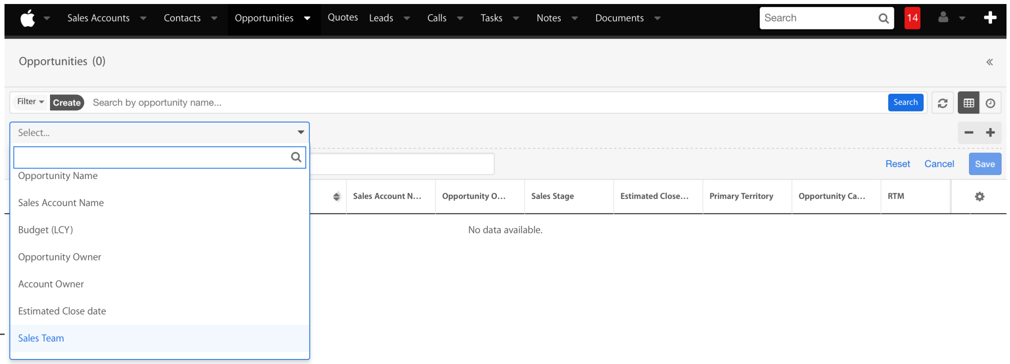

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Filter
Action Needed Opportunities
Search
+ Create
✓ Action Needed Opportunities
Aged Pipeline Opportunities
All Blocked Opportunities
All Opportunities
Current Week Opportunities
My Current Quarter Opportunities

Select Create to create a new Filter

Opportunities (18)

Search by opportunity name...

	Sales Account N…	Opportunity O…	Sales Stage	Estimated Close…	Primary Territory	Opportunity Ca…	RTM
	Andrew Brook …	EUROPE ADMI…	A - Approach -…	07/29/2016	EMEIA	Direct	Retail
y DO	Creative Minds	SBPRO_USA IN…	E - Establish O…	07/30/2016		Direct	Retail
aaa Quo	Adrianna Papell	EUROPE ADMI…	P - Probe - 25%	08/06/2016	Automatic Acc…	Direct	Retail
aaa Quo	Adrianna Papell	EUROPE ADMI…	P - Probe - 25%	08/06/2016	Automatic Acc…	Direct	Retail
aaa Quo	Adrianna Papell	EUROPE ADMI…	P - Probe - 25%	08/06/2016	Automatic Acc…	Direct	Retail


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Filter
Create
Search
Select...
Opportunity Name
Sales Account Name
Budget (LCY)
Opportunity Owner
Account Owner
Estimated Close date
Sales Team
Reset
Cancel
Save

Select a criteria to filter such as all Opportunities linked to

Opportunities (0)

Search by opportunity name...

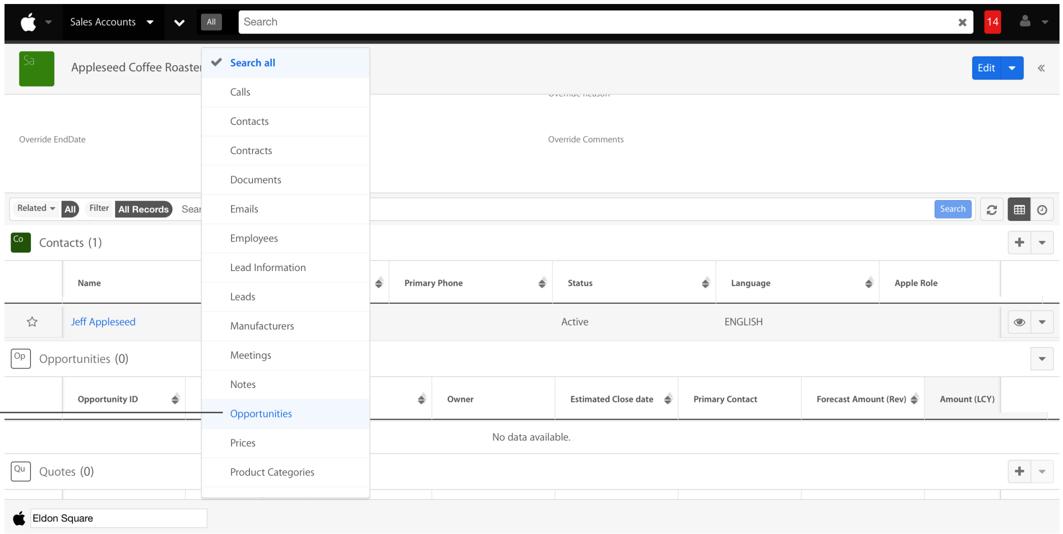
	Sales Account N…	Opportunity O…	Sales Stage	Estimated Close…	Primary Territory	Opportunity Ca…	RTM

No data available.

Searching Opportunities with Global Search

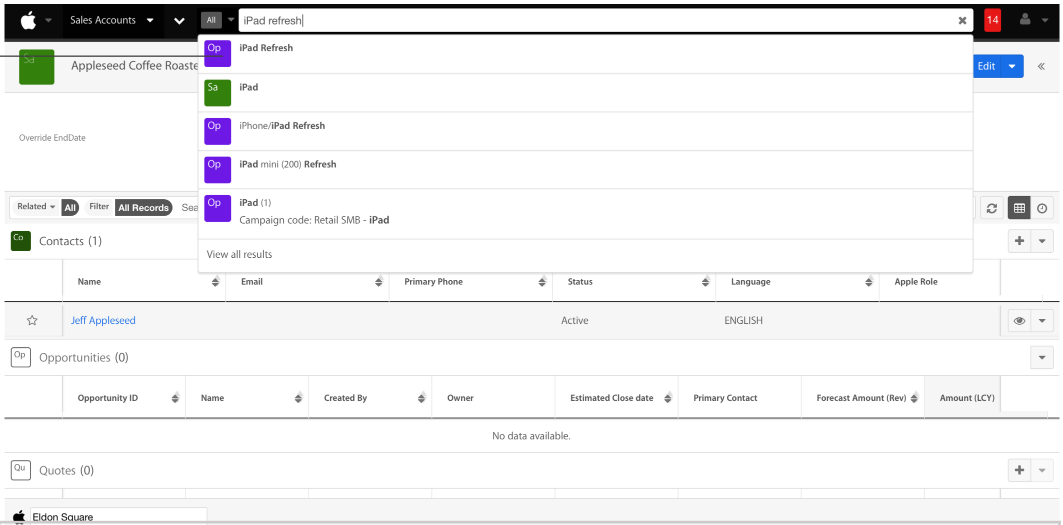
1. From any module within Apple CRM, begin typing the Opportunity title into the Global Search bar.

2. To search against only Opportunities, select the drop down menu next to All and select Opportunities.


Sales Accounts
All
Search
14
Appleseed Coffee Roaster
Edit
Search all
Calls
Contacts
Contracts
Documents
Emails
Employees
Lead Information
Leads
Manufacturers
Meetings
Notes
Opportunities
Prices
Product Categories
Override EndDate
Override Comments
Related
All
Filter
All Records
Search
Contacts (1)
Name
Primary Phone
Status
Language
Apple Role
Jeff Appleseed
Active
ENGLISH
Opportunities (0)
Opportunity ID
Owner
Estimated Close date
Primary Contact
Forecast Amount (Rev)
Amount (LCY)
No data available.
Quotes (0)
Eldon Square

Select Opportunities to search only against Opportunities

3. Type in a search term and press the return key. Global Search will also begin searching as you type in a search term. If a match is found, click that item's link to go directly to that item.


Sales Accounts
All
iPad refresh
14
Appleseed Coffee Roaster
Edit
iPad Refresh
iPad
iPhone/iPad Refresh
iPad mini (200) Refresh
iPad (1)
Campaign code: Retail SMB - iPad
View all results
Override EndDate
Related
All
Filter
All Records
Contacts (1)
Name
Email
Primary Phone
Status
Language
Apple Role
Jeff Appleseed
Active
ENGLISH
Opportunities (0)
Opportunity ID
Name
Created By
Owner
Estimated Close date
Primary Contact
Forecast Amount (Rev)
Amount (LCY)
No data available.
Quotes (0)
Eldon Square

Select an item from the list or press the return key to perform an in depth search

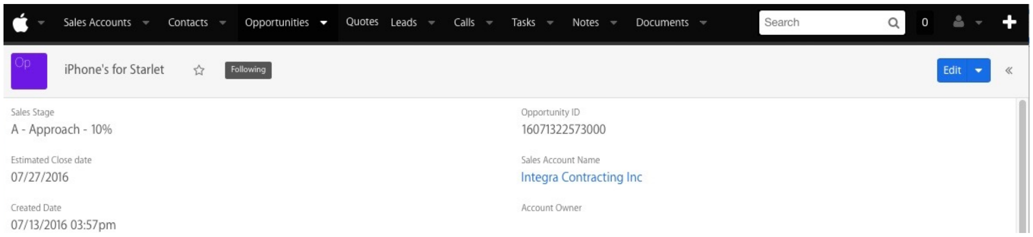
⚠ *ONLY ONE QUOTE PER OPPORTUNITY CAN BE ORDER BOOKED* After one Quote is Order Booked or Released to Customer, the other Quotes will become inactive on the Opportunity. If a customer would like to provide payment on two or more shipments, build a new Opportunity for each intended destination/location.

Closing Opportunities

For Opportunities that are fulfilled in Store (POS) or through Direct Ship (SSO) you will need to change these Opportunities to a Closed Won status.

Or, if a customer does not purchase, an Opportunity must be moved to a Closed Lost status to remove the Opportunity from Pipeline and make sure the Opportunity stage accurately reflects the customer's decision. This section will detail how to move an Opportunity to Closed Won or Closed Lost status when needed.

1. From the Opportunity Detail View, click the blue "Edit" button.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Op
iPhone's for Starlet
Following
Edit

Sales Stage
A - Approach - 10%

Estimated Close date
07/27/2016

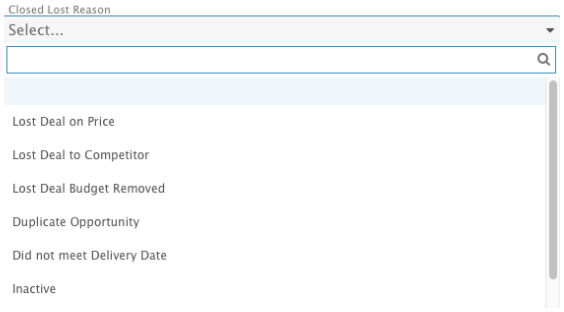
Created Date
07/13/2016 03:57pm

Opportunity ID
16071322573000

Sales Account Name
Integra Contracting Inc

Account Owner

2. Locate the Sales Stage drop down menu in the upper right hand corner. If the customer completed their purchase In Store (POS), select the Closed Won Status. If the customer decided not to buy, select the Closed Lost status.
3. If you select the Closed Lost status, you will be required to complete the Closed Lost reason field. Scroll down to the bottom right to select the Closed Lost Reason.



Closed Lost Reason
Select...

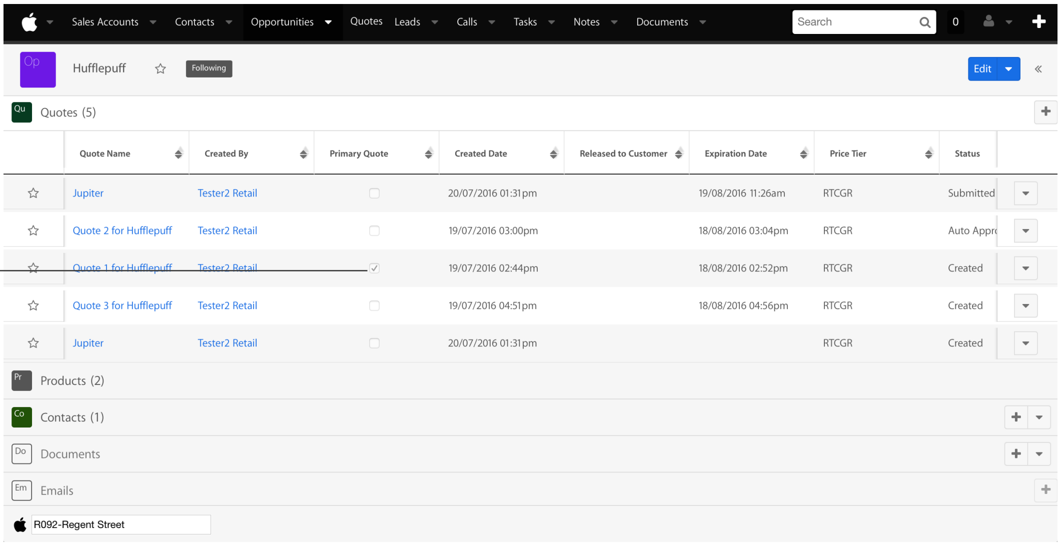
Lost Deal on Price
Lost Deal to Competitor
Lost Deal Budget Removed
Duplicate Opportunity
Did not meet Delivery Date
Inactive

4. Once you have changed the status to Closed Won or if you have changed the status to Closed Lost and a Closed Lost Reason, click the blue "Save" button.

Adding Opportunities to Forecast (Pipeline)

The Primary Quote on an Opportunity is automatically added to Forecast (Pipeline). If there is a single Quote within an Opportunity, that Quote will be automatically designated as Primary and added to Forecast. Once add to Forecast has been done Pipeline Health reporting will be reflected.

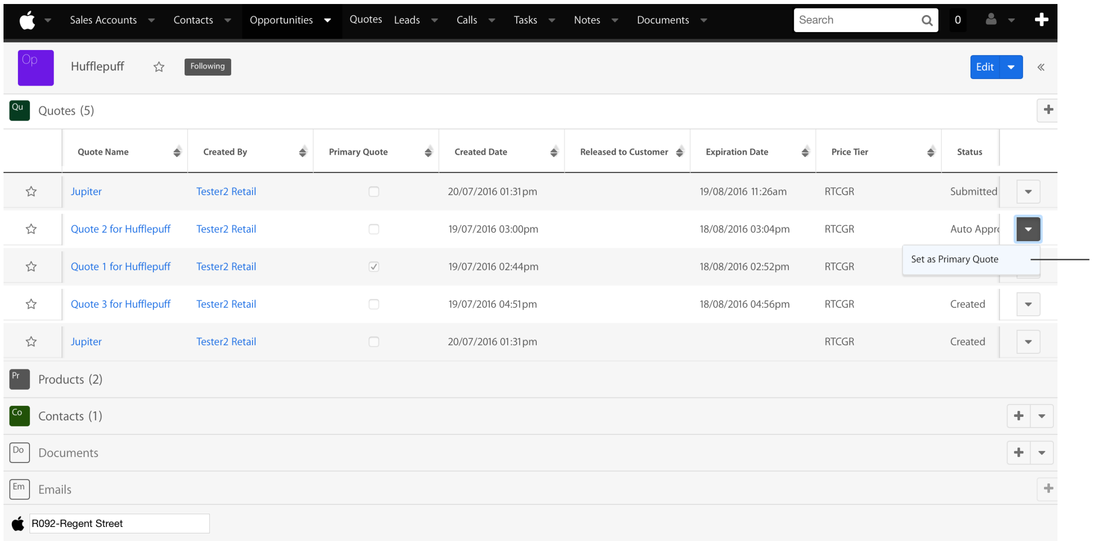
If there are multiple Quotes within an Opportunity, the Primary Quote as designated by the checkbox in the Quotes sub-panel of an Opportunity will be added to Forecast. Only one Quote per Opportunity can be added to Forecast at a time.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Op
Hufflepuff
Following
Edit
Qu
Quotes (5)
Pr
Products (2)
Co
Contacts (1)
Do
Documents
Em
Emails
R092-Regent Street

Quote Name	Created By	Primary Quote	Created Date	Released to Customer	Expiration Date	Price Tier	Status
Jupiter	Tester2 Retail	☐	20/07/2016 01:31pm		19/08/2016 11:26am	RTCGR	Submitted
Quote 2 for Hufflepuff	Tester2 Retail	☐	19/07/2016 03:00pm		18/08/2016 03:04pm	RTCGR	Auto Appr
Quote 1 for Hufflepuff	Tester2 Retail	☑	19/07/2016 02:44pm		18/08/2016 02:52pm	RTCGR	Created
Quote 3 for Hufflepuff	Tester2 Retail	☐	19/07/2016 04:51pm		18/08/2016 04:56pm	RTCGR	Created
Jupiter	Tester2 Retail	☐	20/07/2016 01:31pm			RTCGR	Created

The Primary Quote as indicated by this checkbox will be added to Forecast

To set another Quote as the Primary Quote, select the down arrow to the far right of the Quote and select Set as Primary Quote.

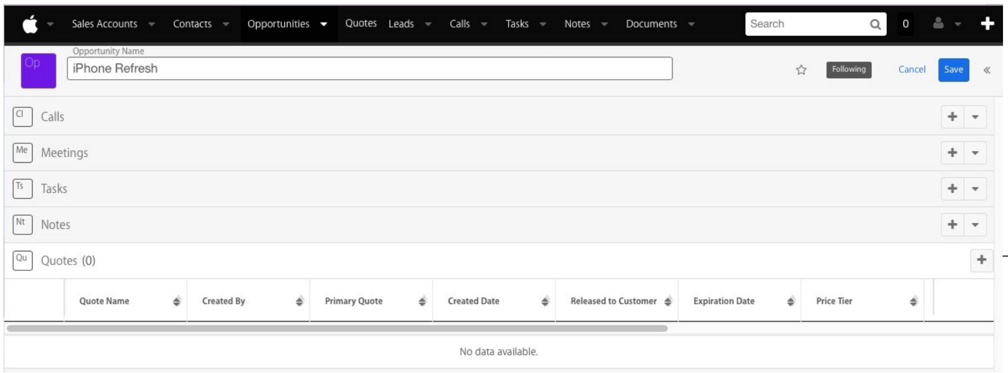

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Op
Hufflepuff
Following
Edit
Qu
Quotes (5)
Set as Primary Quote
Pr
Products (2)
Co
Contacts (1)
Do
Documents
Em
Emails
R092-Regent Street

Quote Name	Created By	Primary Quote	Created Date	Released to Customer	Expiration Date	Price Tier	Status
Jupiter	Tester2 Retail	☐	20/07/2016 01:31pm		19/08/2016 11:26am	RTCGR	Submitted
Quote 2 for Hufflepuff	Tester2 Retail	☐	19/07/2016 03:00pm		18/08/2016 03:04pm	RTCGR	Auto Appr
Quote 1 for Hufflepuff	Tester2 Retail	☑	19/07/2016 02:44pm		18/08/2016 02:52pm	RTCGR	
Quote 3 for Hufflepuff	Tester2 Retail	☐	19/07/2016 04:51pm		18/08/2016 04:56pm	RTCGR	Created
Jupiter	Tester2 Retail	☐	20/07/2016 01:31pm			RTCGR	Created

Select Set as Primary Quote to make a Quote the Primary Quote and add it to Forecast

Creating Quotes

1. From an existing Opportunity, find the Quotes sub-panel and click the "+" button.



Opportunity Name: iPhone Refresh

Quote Name	Created By	Primary Quote	Created Date	Released to Customer	Expiration Date	Price Tier

No data available.

From an Opportunity, Click the Create button on the Quotes sub panel.

2. When a Quote is created from an existing Opportunity, the required fields will be pre-populated with customer information. Validate this information is accurate.

3. Select the Intended Fulfillment as SSO or POS depending if the order will be picked up in Store or shipped to the customer.

⚠ *SWITCHING FULFILLMENT METHOD ON A QUOTE* If a customer decides to switch their fulfillment method, a new Quote should be created for the updated fulfillment method. It is not recommended to change the fulfillment method on the Quote once it is created.

4. In the Contacts field, click the arrow next to the field to search the CRM. From the pop-up screen, select a Contact from the list of Contacts on the Sales Account.

5. In the SAP-CRM Store field, click the arrow next to the field. From the pop-up screen select the Store the customer is approved for or their SAP Sold To number.

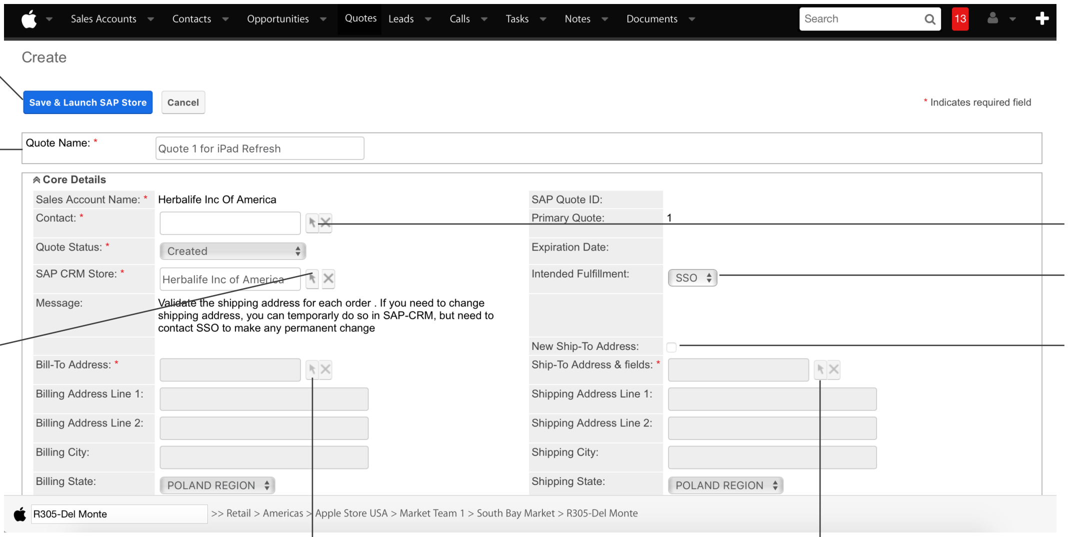
6. On each new record be sure to confirm territory matches the intended Retail Store for Pipeline and eventual transaction revenue in sales reporting and dashboards.

7. The Bill To address will default to the Primary Sales Account Location (HQ) address on the Sales Account. To select a different Sales Account Location, select the arrow next to the Bill-To Address field.

8. The Ship-To Address fields will default default to the Primary Sales Account Location (HQ) address on the Sales Account. To select a different Sales Account Location, select the arrow next to the Ship-To Address field.

9. Or, to enter a New Ship-To address for this Quote only, select the New Ship-To checkbox to edit the Shipping Address fields.

10. Once complete, select Save and Launch SAP Store to build a Quote from SAP-CRM.



Quote Name: *	Quote 1 for iPad Refresh		
Sales Account Name: *	Herbalife Inc Of America	SAP Quote ID:	
Contact: *		Primary Quote:	1
Quote Status: *	Created	Expiration Date:	
SAP CRM Store: *	Herbalife Inc of America	Intended Fulfillment:	SSO
Message:	Validate the shipping address for each order . If you need to change shipping address, you can temporarly do so in SAP-CRM, but need to contact SSO to make any permanent change		
		New Ship-To Address:	☐
Bill-To Address: *		Ship-To Address & fields: *	
Billing Address Line 1:		Shipping Address Line 1:	
Billing Address Line 2:		Shipping Address Line 2:	
Billing City:		Shipping City:	
Billing State:	POLAND REGION	Shipping State:	POLAND REGION

R305-Del Monte >> Retail > Americas > Apple Store USA > Market Team 1 > South Bay Market > R305-Del Monte

Select Save and Launch SAP Store to launch SAP-CRM

Use this field to provide a specific customer facing name for this Quote.

Tap the arrow to select the customer's approved SAP CRM Store or their SAP Sold To number

Select the Arrow to select a Contact from the list of existing Contacts on the Sales Account

Select Intended Fulfillment

Select the New Ship-To Address checkbox to edit the Ship-To address for this Quote only

Select the arrow next to Bill-To Address to select a different Sales Account location for the Bill-To address

Select the arrow next to Ship-To Address to select a different Sales Account location for the Ship-To address

Building a Quote within an Opportunity using SAP-CRM

Apple CRM utilizes SAP-CRM to build Quotes and submit SSO Direct Ship orders for Business Customers. Using Apple CRM and SAP-CRM together, you can:

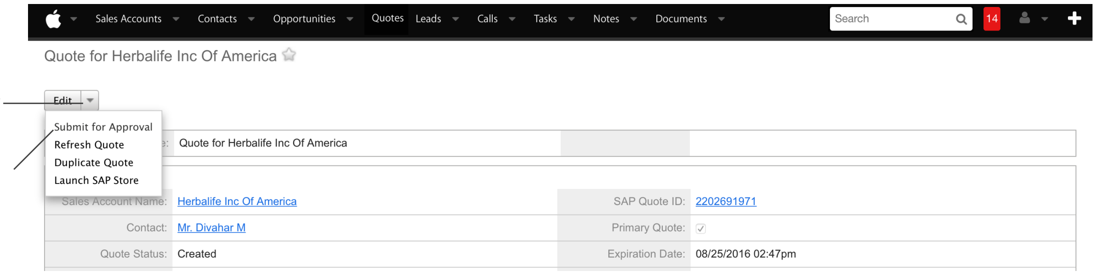
- Build and deliver accurate Quotes quickly
- Manage multiple Quotes per Opportunity record
- Create SSO Direct Ship orders

The SAP-CRM functionality has not changed with Apple CRM. To learn how to use SAP-CRM to create and deliver Quotes, refer to the *Quoting and Ordering with SAP-CRM* material on RetailMe.

Submit a Quote for Approval

Quotes that require Corporate Approval or Quotes where manual review is selected will be sent to the Engagement Team for review. Follow these steps to send Quotes that need Corporate Approval to the Engagement Team. When a Quote requires Corporate Approval, the Sales Exception Approval (SEA) Tool will be used by the Engagement Team to provide approval or next steps. The SEA number is provided on the Quote details screen and links directly to the SEA details. All members of the Sales Team can view the SEA on a Quote by Quote basis.

1. Add Notes in the Opportunity Engagement Comments field to clearly communicate to the Engagement Team a concise overview
2. From the Quote Detail view, select the drop down arrow next to Edit.
3. Select Submit for Approval.



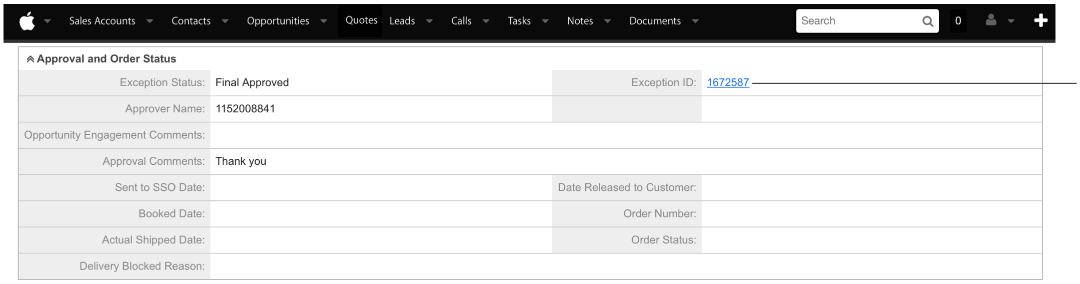
Quote for Herbalife Inc Of America

	Quote for Herbalife Inc Of America		
Sales Account Name:	Herbalife Inc Of America	SAP Quote ID:	2202691971
Contact:	Mr. Divahar M	Primary Quote:	✓
Quote Status:	Created	Expiration Date:	08/25/2016 02:47pm

Select the drop down next to Edit

Select Submit for Approval

4. Once Submitted for Approval, the Quote Status will change to Auto Approved if the Quote is Auto Approved or Submitted for Approval if it is being reviewed by the Engagement Team.
5. If the Quote is sent to the Engagement Team for Corporate Approval, it will be reviewed by the Engagement Team.
6. If the Quote is approved by the Engagement Team, it will be sent back with the Corporate Approved Status.
7. The Engagement Team may pushback a Quote for a variety of reasons. If this happens, the Quote will be sent back with Comments from the Engagement Team in the Approval Comments field. In this scenario Approval Status will be set to Unsubmitted.
8. At any time you can click on the Exception ID to reach the SEA details in the SEA Tool. This view provides full information on the pricing, products, and next steps in the approval process. Additionally you can see response time and history of the approval process.
9. The SEA Tool is used to manage the approval workflow within Apple CRM and is covered in more detail in the next section.



Approval and Order Status

Exception Status:	Final Approved	Exception ID:	1672587
Approver Name:	1152008841		
Opportunity Engagement Comments:			
Approval Comments:	Thank you		
Sent to SSO Date:		Date Released to Customer:	
Booked Date:		Order Number:	
Actual Shipped Date:		Order Status:	
Delivery Blocked Reason:			

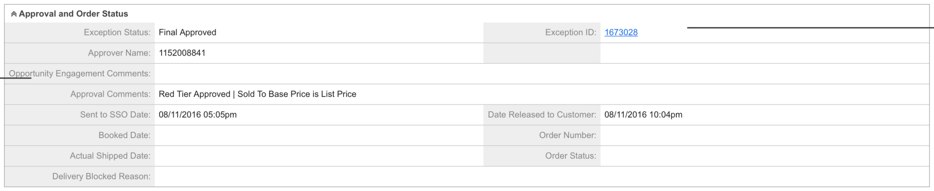
Select an Exception ID to view the approval details

Sales Exception Approval (SEA) Tool for Opportunities submitted for Approval

When a user submits a Quote for approval, Apple CRM will submit the Quote to the Engagement Team using the SEA Tool. Note, the SEA Tool is not used for Opportunities that are Auto Approved.

Approvals are managed by the Engagement Team using the SEA Tool and Apple CRM users will be able to view Engagement Team comments and other order related details in the SEA Tool. This section will detail how to view information in the SEA Tool when submitting an Opportunity for Corporate Approval.

1. After submitting a Quote for Corporate Approval, you will be able to see the most recent approval comments on the Quote detail view. You can also access the SEA Tool by clicking the Exception ID on the Quote to see the full approval comments history (if applicable).



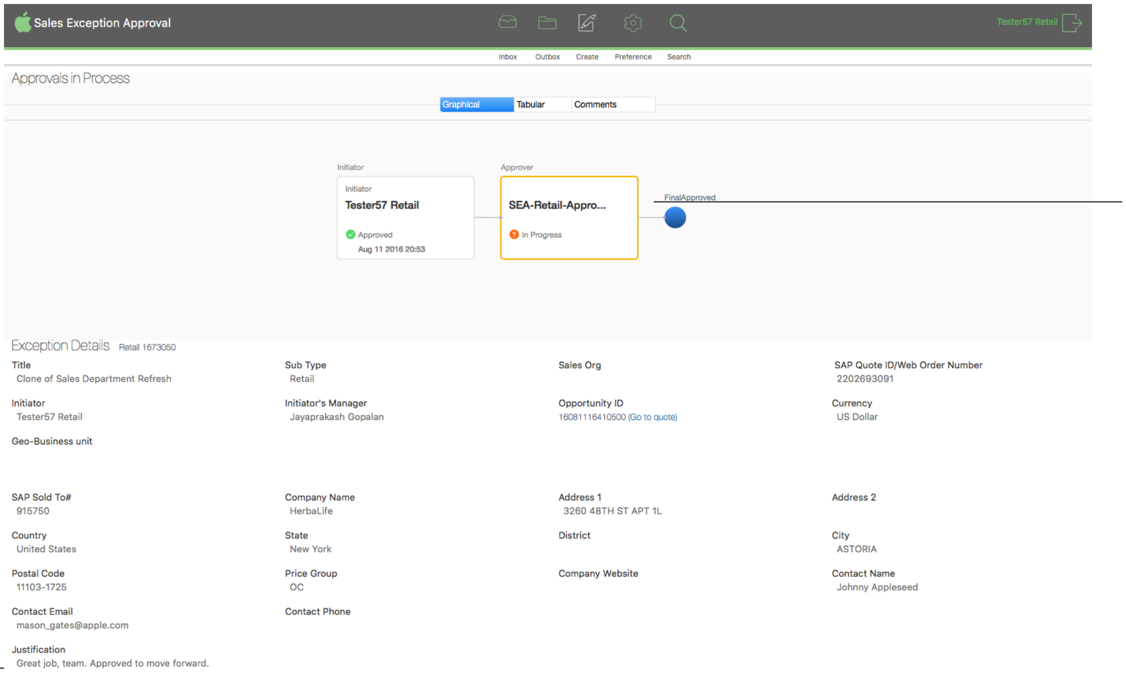
Approval and Order Status

Exception Status:	Final Approved	Exception ID:	1673028
Approver Name:	1152008841		
Opportunity Engagement Comments:			
Approval Comments:	Red Tier Approved | Sold To Base Price is List Price		
Sent to SSO Date:	08/11/2016 05:05pm	Date Released to Customer:	08/11/2016 10:04pm
Booked Date:		Order Number:	
Actual Shipped Date:		Order Status:	
Delivery Blocked Reason:			

View the most recent approval comment on the Quote detail view

Select an Exception ID to view the approval details

2. Clicking the Exception ID in the Apple CRM Quote will bring up the SEA Tool in a new window. Here you can view where the Quote is in the approval workflow. You can also view Opportunity Engagement Comments entered on the Quote in Apple CRM in the Justification field in the SEA Tool.



Exception Details Retail 1673050

Title
Clone of Sales Department Refresh

Sub Type
Retail

Sales Org

SAP Quote ID/Web Order Number
2202693091

Initiator
Tester57 Retail

Initiator's Manager
Jayaprakash Gopalan

Opportunity ID
16081116410500 (Go to quote)

Currency
US Dollar

Geo-Business unit

SAP Sold To#
915750

Company Name
HerbaLife

Address 1
3260 48TH ST APT 1L

Address 2

Country
United States

State
New York

District

City
ASTORIA

Postal Code
11103-1725

Price Group
OC

Company Website

Contact Name
Johnny Appleseed

Contact Email
mason_gates@apple.com

Contact Phone

Justification
Great job, team. Approved to move forward.

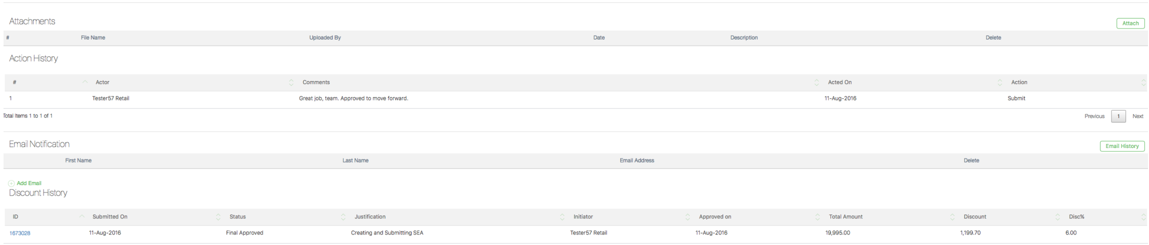
View where the Quote is in the approval workflow here

Opportunity Engagement Comments (e.g. BL or BM Notes) appear here in the SEA Tool

3. To view all Engagement Team Comments, scroll down to the Action History section within the SEA Tool.

4. Discount History will display previous Quotes that have been submitted to the SEA Tool for this specific Sales Account.

5. Once an Opportunity is Approved by the Engagement Team you will receive an email alerting you that Opportunity has been approved for booking or quoting to the customer.



View the full history of Engagement Team comments in the Action History section

View history of Quotes that have been submitted to SEA Tool for this specific Sales Account

Attachments

#	File Name	Uploaded By	Date	Description	Delete

Action History

#	Actor	Comments	Acted On	Action
1	Tester57 Retail	Great job, team. Approved to move forward.	11-Aug-2016	Submit

Total Items 1 to 1 of 1

Email Notification

First Name	Last Name	Email Address	Delete

Discount History

ID	Submitted On	Status	Justification	Initiator	Approved on	Total Amount	Discount	Disc%
1673028	11-Aug-2016	Final Approved	Creating and Submitting SEA	Tester57 Retail	11-Aug-2016	19,995.00	1,199.70	6.00

Share Quote with Customer via Email or Custom Store

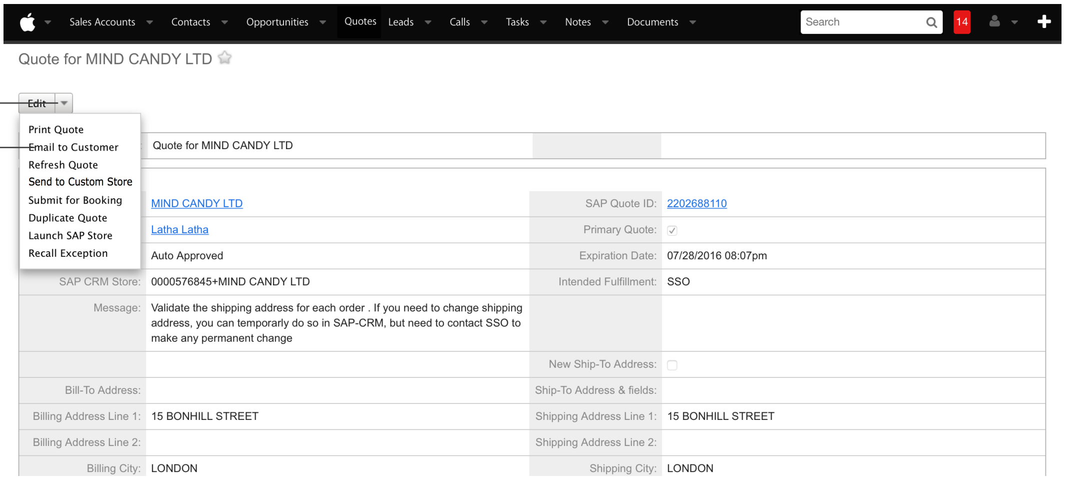
Apple CRM has the ability to email a Quote directly to a customer. In addition, you can send the Quote to a customer's Custom Store if the have one. This allows the customer to review and place the order themselves on their Custom Store, just like if they created a cart and purchased on their own. These are the primary ways and best practice for how to deliver a Quote to a customer. This function is only available if a Quote is Corporate Approved or Auto Approved and can only be used for one Quote at a time. Benefits of this functionality include:

- Fully integrated workflow that allows you to email a PDF copy of the Quote without leaving Apple CRM
- When the email is generated and sent to the customer, the Quote will include a QR code for EasyPay customer Sales Account look up
- Apple CRM will document each Quote that is emailed to a customer in the Sales Account Activity Stream, so you can easily reference when you sent a Quote to a customer
- Comments and additional information for the customer can be entered directly on the Quote in the Additional Information section
- The Quote will be sent from the business team email address associated with the assigned Territory on the Quote for Retail Store Users. For Account Managers their individual email address is used.

Sharing Quotes via Email

1. From the Quote Detail view, select the drop down arrow next to Edit.

2. Select Email to Customer. This option will only appear if the Quote is Corporate Approved or Auto Approved.

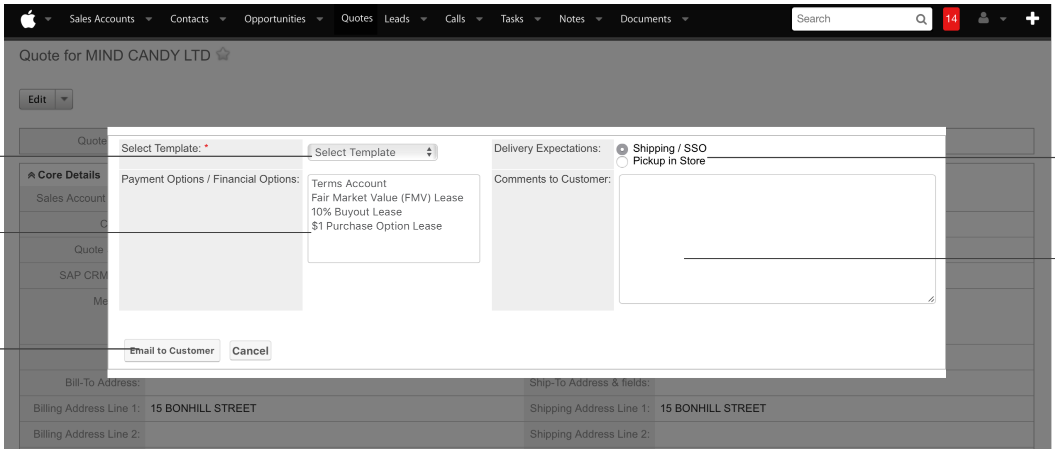

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Quote for MIND CANDY LTD
Edit
Print Quote
Email to Customer
Refresh Quote
Send to Custom Store
Submit for Booking
Duplicate Quote
Launch SAP Store
Recall Exception

	Quote for MIND CANDY LTD		
	MIND CANDY LTD	SAP Quote ID:	2202688110
	Latha Latha	Primary Quote:	☑
	Auto Approved	Expiration Date:	07/28/2016 08:07pm
SAP CRM Store:	0000576845+MIND CANDY LTD	Intended Fulfillment:	SSO
Message:	Validate the shipping address for each order . If you need to change shipping address, you can temporarly do so in SAP-CRM, but need to contact SSO to make any permanent change		
		New Ship-To Address:	☐
Bill-To Address:		Ship-To Address & fields:	
Billing Address Line 1:	15 BONHILL STREET	Shipping Address Line 1:	15 BONHILL STREET
Billing Address Line 2:		Shipping Address Line 2:	
Billing City:	LONDON	Shipping City:	LONDON

Select the drop down next to Edit

Select Email to Customer

3. Select a Pro Forma or Quote template to send.
4. Select the fulfillment method (SSO or In Store/POS) in the Delivery Expectations field.
5. Select Payment Options/Financial Options to share with the customer as alternative payment methods.
6. Include any comments or notes for the customer in the Comments to Customer field. Note, the body of the email cannot be edited. Please make sure any additional information for the customer that would be included in the body of the email is entered here, or send the customer a separate email letting them know you will be sending them a Quote or have sent them a Quote.
7. Select Email to Customer.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Edit
Core Details
Select Template
Email to Customer
Cancel

Quote for MIND CANDY LTD

Select Template: *

Payment Options / Financial Options: Terms Account, Fair Market Value (FMV) Lease, 10% Buyout Lease, $1 Purchase Option Lease

Delivery Expectations: ● Shipping / SSO ○ Pickup in Store

Comments to Customer:

Billing Address Line 1: 15 BONHILL STREET

Shipping Address Line 1: 15 BONHILL STREET

Select a Quote Template

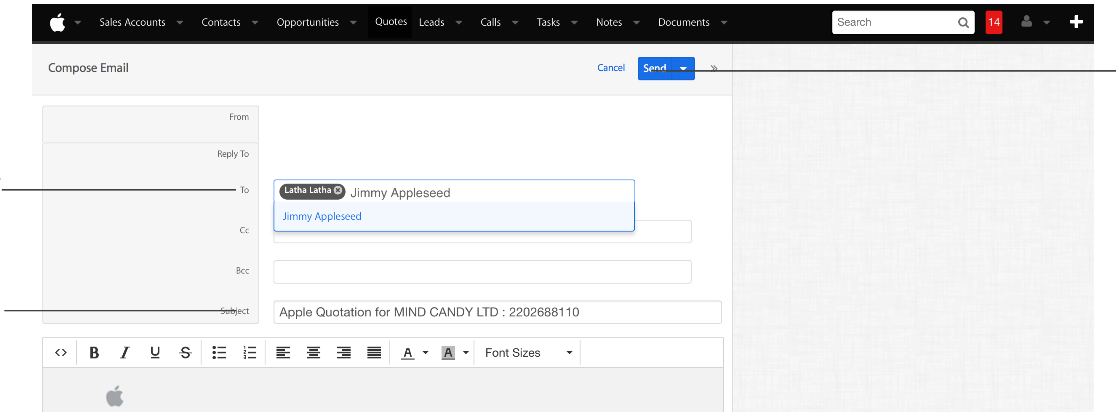
Select a Payment Option/Financial Option if applicable

Select Email to Customer

Select a fulfillment method

Enter customer comments if needed

8. The Contact on the Opportunity will automatically be populated in the To field. The email address is locked an Quotes must be sent to the Contact on the Quote.
9. The email will send from the email of the Sales Team linked to the Sales Account Territory. For example, Sales Accounts for the Del Monte Store will have Quotes emailed from delmontebusiness@apple.com. The Prepared By Field on the Quote will indicate to the customer which team member sent the Quote.
10. The Subject of the email will default to the name of the Quote. Because Quote names can include internal facing language, make sure that you update the email Subject to customer facing language.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Cancel
Send
From
Reply To
Cc
Bcc
Font Sizes

Compose Email

To: Latha Latha Jimmy Appleseed

Jimmy Appleseed

Subject: Apple Quotation for MIND CANDY LTD : 2202688110

Select Send to send the Quote to the customer

The Contact on the Opportunity is included in the To field as default. Type in another Contact name in the To, Cc, or Bcc fields if needed

Update the Subject here to customer facing language

11. Remember that the body of the email cannot be edited, and any additional information for the customer should included in the Comments to Customer field. These comments will show on the Quote and in the email under the Additional Notes section of the Quote.

12. Note, Apple CRM will send a Quote with a Sales Account QR code. The QR code is generated as the email is sent to the customer and will appear as a ? in the email draft in Apple CRM, due to Safari functionality. The customer facing Quote delivered in the email will contain the actual QR code and not this symbol, only Apple users will see ? when drafting an email.

13. Select Send.

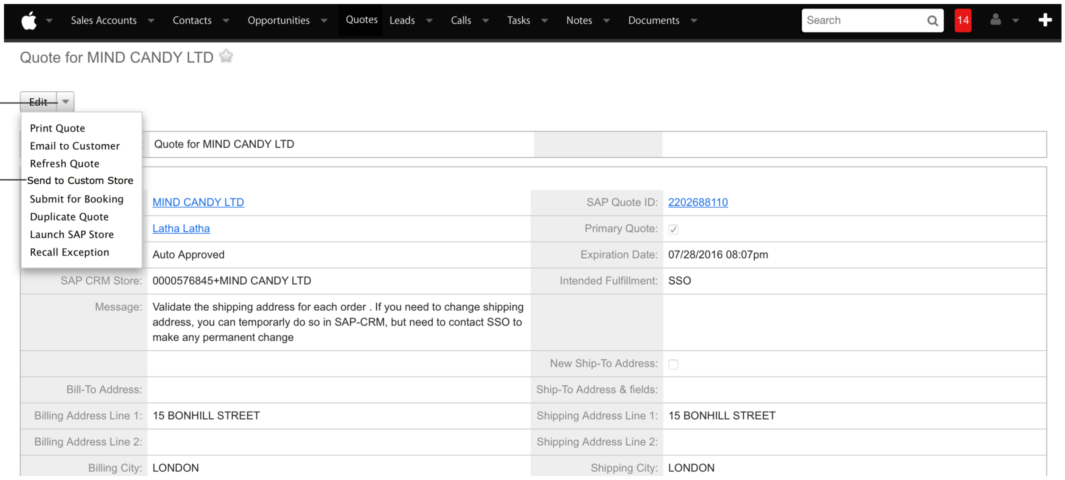
Sending Quotes to a Customer's Custom Store

1. From the Quote Detail view, select the drop down arrow next to Edit.

2. Select Send to Custom Store. This option will only appear if the Quote is Corporate Approved or Auto Approved.

Select the drop down next to Edit

Select to send to a Custom's Custom Store


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Edit
Print Quote
Email to Customer
Refresh Quote
Send to Custom Store
Submit for Booking
Duplicate Quote
Launch SAP Store
Recall Exception

Quote for MIND CANDY LTD

	Quote for MIND CANDY LTD		
	MIND CANDY LTD	SAP Quote ID:	2202688110
	Latha Latha	Primary Quote:	☑
	Auto Approved	Expiration Date:	07/28/2016 08:07pm
SAP CRM Store:	0000576845+MIND CANDY LTD	Intended Fulfillment:	SSO
Message:	Validate the shipping address for each order . If you need to change shipping address, you can temporarly do so in SAP-CRM, but need to contact SSO to make any permanent change		
		New Ship-To Address:	☐
Bill-To Address:		Ship-To Address & fields:	
Billing Address Line 1:	15 BONHILL STREET	Shipping Address Line 1:	15 BONHILL STREET
Billing Address Line 2:		Shipping Address Line 2:	
Billing City:	LONDON	Shipping City:	LONDON

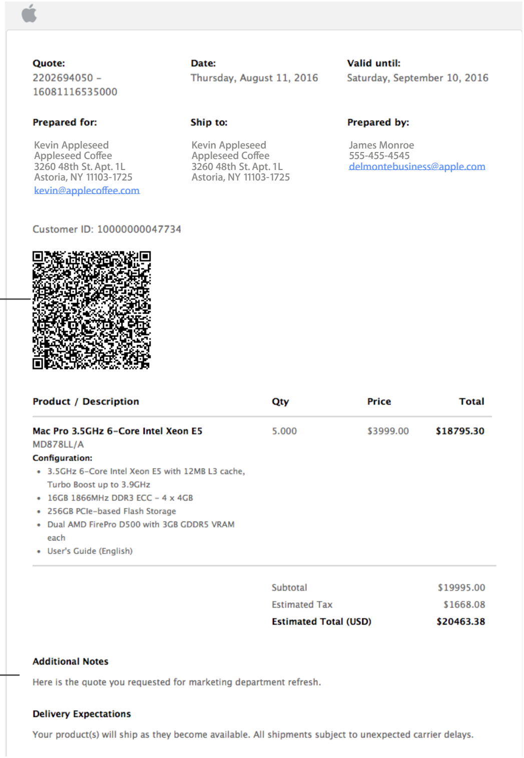
3. Once sent to the customer's Custom Store, the customer can login to review the Quote and place the order.

⚠ *ENSURE CONTACT IS FAMILIAR WITH CUSTOM STORES* Before sending a Quote to a Customer's Custom Store, ensure that the customer has a Custom Store setup and that the Contact on the Quote is an Authorized User of the Custom Store who has previously logged in.

Using Apple CRM Quotes in Store with QR Code

To make it easier to lookup Relationship business customers through EasyPay in Store, Quotes from Apple CRM contain a QR code that can be scanned to link an in store purchase to a Sales Account. This section will show you how to share a Quote with a QR code.

- QR codes will only be generated on a Quote that is emailed to the customer and your team's email directly from Apple CRM
- Remember that the QR code will appear as ? in Apple CRM, and will be replaced by a QR code when the email is generated.
- If the customer requests a physical copy you can print from Apple CRM but these Quotes will not contain the QR code.
- To learn more about how to use the QR code in Store to look up a Sales Account, refer to the Business in EasyPay Guide in RetailMe. Booking Orders for our Customers with SSO



Quote:
2202694050 – 16081116535000

Date:
Thursday, August 11, 2016

Valid until:
Saturday, September 10, 2016

Prepared for:
Kevin Appleseed
Appleseed Coffee
3260 48th St. Apt. 1L
Astoria, NY 11103-1725
kevin@applecoffee.com

Ship to:
Kevin Appleseed
Appleseed Coffee
3260 48th St. Apt. 1L
Astoria, NY 11103-1725

Prepared by:
James Monroe
555-455-4545
delmontebusiness@apple.com

Customer ID: 10000000047734

Product / Description	Qty	Price	Total
Mac Pro 3.5GHz 6-Core Intel Xeon E5 MD878LL/A **Configuration:** • 3.5GHz 6-Core Intel Xeon E5 with 12MB L3 cache, Turbo Boost up to 3.9GHz • 16GB 1866MHz DDR3 ECC - 4 x 4GB • 256GB PCIe-based Flash Storage • Dual AMD FirePro D500 with 3GB GDDR5 VRAM each • User's Guide (English)	5.000	$3999.00	**$18795.30**

Subtotal	$19995.00
Estimated Tax	$1668.08
Estimated Total (USD)	**$20463.38**

Additional Notes

Here is the quote you requested for marketing department refresh.

Delivery Expectations

Your product(s) will ship as they become available. All shipments subject to unexpected carrier delays.

Once the email is generated and sent, the QR code will appear in place of ?

Customers can bring a copy of this Quote or the email itself to the Store to have their in Store transaction easily linked to their Sales Account

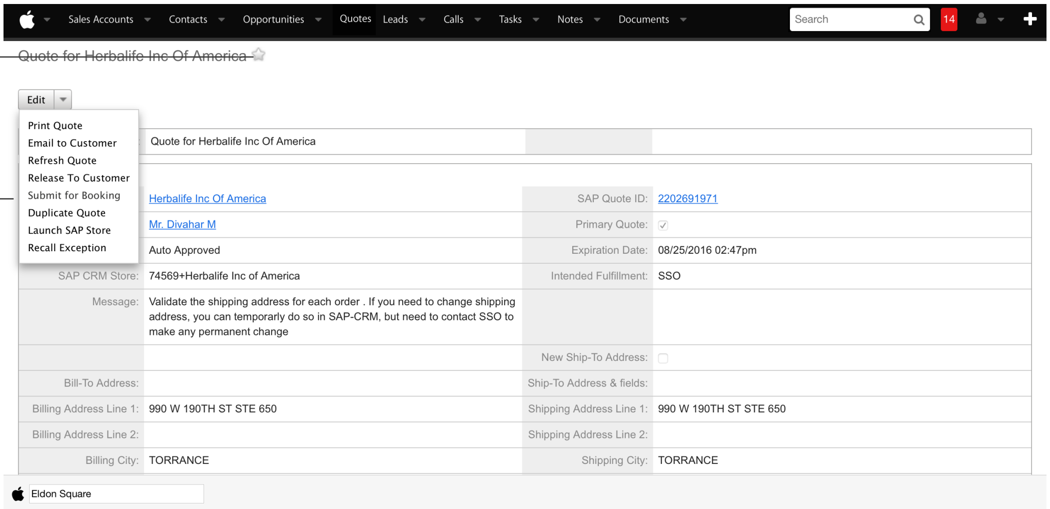
Additional information for the customer that was included in the Comments to Customer field when creating the email will appear here

Submitting a Quote for Booking

Follow these steps to submit a Quote for Booking, confirming any necessary details, and tracking orders and shipping.

1. Once the Quote is Corporate Approved or Auto Approved, select the drop down menu next to Edit.
2. Select Submit for Booking.

3. It is recommended that you click the Star to add the Quote to your Activity Stream to follow relevant status updates.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Edit
Print Quote
Email to Customer
Refresh Quote
Release To Customer
Submit for Booking
Duplicate Quote
Launch SAP Store
Recall Exception
Eldon Square

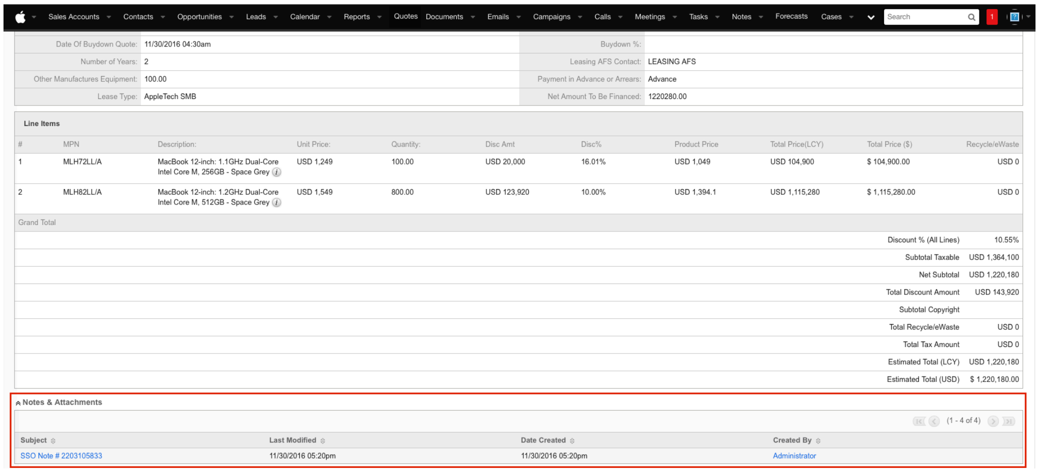
Select the star to add the Quote to your Activity Stream to follow relevant status updates

Select Submit for Booking once the Quote Status is Auto Approved or Corporate Approved

Quote for Herbalife Inc Of America

	Quote for Herbalife Inc Of America		
	Herbalife Inc Of America	SAP Quote ID:	2202691971
	Mr. Divahar M	Primary Quote:	☑
	Auto Approved	Expiration Date:	08/25/2016 02:47pm
SAP CRM Store:	74569+Herbalife Inc of America	Intended Fulfillment:	SSO
Message:	Validate the shipping address for each order . If you need to change shipping address, you can temporarly do so in SAP-CRM, but need to contact SSO to make any permanent change		
		New Ship-To Address:	☐
Bill-To Address:		Ship-To Address & fields:	
Billing Address Line 1:	990 W 190TH ST STE 650	Shipping Address Line 1:	990 W 190TH ST STE 650
Billing Address Line 2:		Shipping Address Line 2:	
Billing City:	TORRANCE	Shipping City:	TORRANCE

4. If SSO requires additional information then their request will appear in the Notes & Attachments section of the Quotes submitted. Click on the Note subject name to view the pushback details.


Sales Accounts
Contacts
Opportunities
Leads
Calendar
Reports
Quotes
Documents
Emails
Campaigns
Calls
Meetings
Tasks
Notes
Forecasts
Cases
Search
1
(1 - 4 of 4)

Date Of Buydown Quote:	11/30/2016 04:30am	Buydown %:	
Number of Years:	2	Leasing AFS Contact:	LEASING AFS
Other Manufactures Equipment:	100.00	Payment in Advance or Arrears:	Advance
Lease Type:	AppleTech SMB	Net Amount To Be Financed:	1220280.00

Line Items

#	MPN	Description:	Unit Price:	Quantity:	Disc Amt	Disc%	Product Price	Total Price(LCY)	Total Price ($)	Recycle/eWaste
1	MLH72LL/A	MacBook 12-inch: 1.1GHz Dual-Core Intel Core M, 256GB - Space Grey	USD 1,249	100.00	USD 20,000	16.01%	USD 1,049	USD 104,900	$ 104,900.00	USD 0
2	MLH82LL/A	MacBook 12-inch: 1.2GHz Dual-Core Intel Core M, 512GB - Space Grey	USD 1,549	800.00	USD 123,920	10.00%	USD 1,394.1	USD 1,115,280	$ 1,115,280.00	USD 0

Grand Total

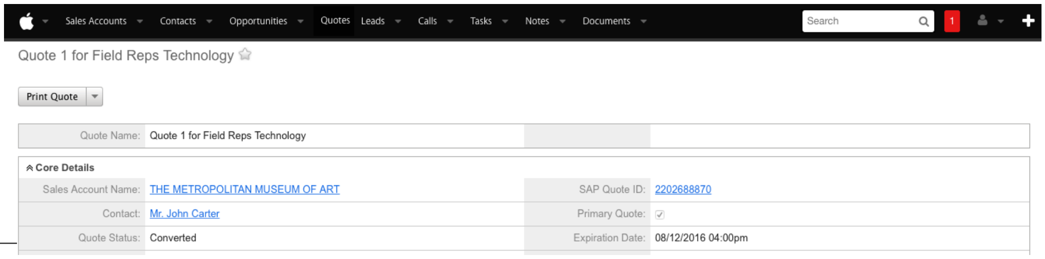
Discount % (All Lines)	10.55%
Subtotal Taxable	USD 1,364,100
Net Subtotal	USD 1,220,180
Total Discount Amount	USD 143,920
Subtotal Copyright	
Total Recycle/eWaste	USD 0
Total Tax Amount	USD 0
Estimated Total (LCY)	USD 1,220,180
Estimated Total (USD)	$ 1,220,180.00

Notes & Attachments

Subject	Last Modified	Date Created	Created By
SSO Note # 2203105833	11/30/2016 05:20pm	11/30/2016 05:20pm	Administrator

5. Once the request from SSO has been actioned, repeat steps 1 and 2 to Submit for Booking.

6. Once the Quote has been Submitted for Booking and actioned by SSO, it will change to a Converted status as shown in the Quote Status field in the Quote view.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
1
Print Quote

Quote 1 for Field Reps Technology

Quote Name: Quote 1 for Field Reps Technology

Core Details

Sales Account Name: THE METROPOLITAN MUSEUM OF ART

SAP Quote ID: 2202688870

Contact: Mr. John Carter

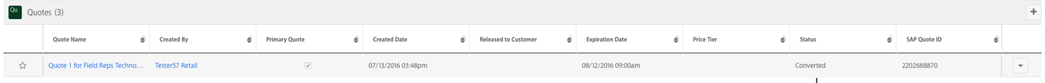
Primary Quote: ☑

Quote Status: Converted

Expiration Date: 08/12/2016 04:00pm

View when a Quote is Converted in the Quote Status field of a Quote

7. You can also view Quote Status in the Quotes sub-panel in the Opportunity or Sales Account.



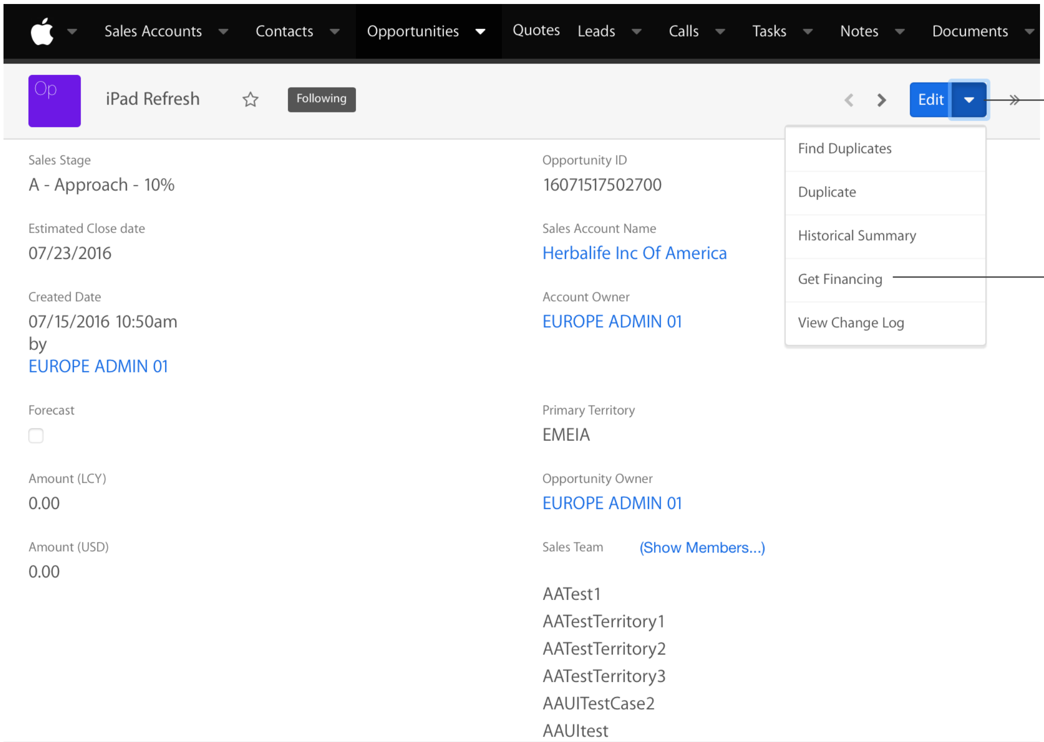
Quote Name	Created By	Primary Quote	Created Date	Released to Customer	Expiration Date	Price Tier	Status	SAP Quote ID
Quote 1 for Field Reps Techno…	Tester57 Retail	☑	07/13/2016 03:48pm		08/12/2016 09:00am		Converted	2202688870

Or view the Quote Status in the Quotes sub-panel of an Opportunity or Sales Account

Get Financing Portal

The Get Financing portal is used in some countries to access the Terms and or Lease application. In Apple CRM, this portal is accessed within an Opportunity. This section will show you how to access this portal when creating an Opportunity.

1. From the Opportunity Detail View, click the arrow next to the blue "Edit" button.
2. Select the Get Financing button.
3. This will launch a page to the Get Financing portal where you can continue the Terms and or Lease application process. Refer to the Materials in the Financial Services folder on RetailMe for details on how to complete a Terms or Lease Application.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Op
iPad Refresh
Following
Edit
Find Duplicates
Duplicate
Historical Summary
Get Financing
View Change Log

Sales Stage
A - Approach - 10%

Estimated Close date
07/23/2016

Created Date
07/15/2016 10:50am
by
EUROPE ADMIN 01

Forecast
☐

Amount (LCY)
0.00

Amount (USD)
0.00

Opportunity ID
16071517502700

Sales Account Name
Herbalife Inc Of America

Account Owner
EUROPE ADMIN 01

Primary Territory
EMEIA

Opportunity Owner
EUROPE ADMIN 01

Sales Team (Show Members...)

AATest1
AATestTerritory1
AATestTerritory2
AATestTerritory3
AAUITestCase2
AAUItest

Select the arrow next to the Edit button

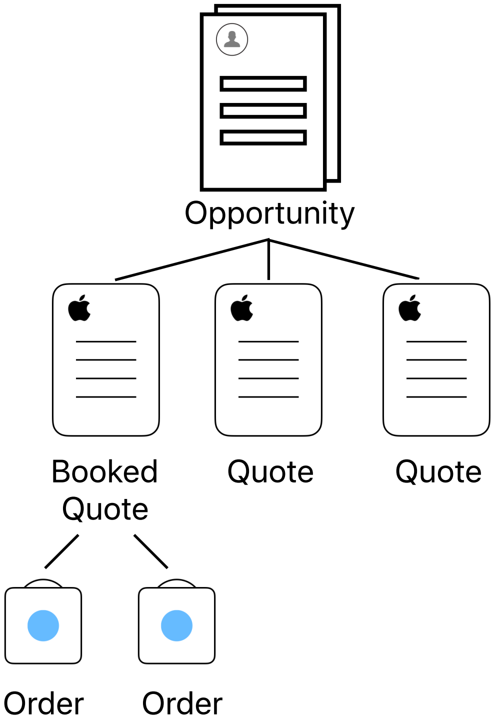
Select Get Financing

Order Status for Opportunities and Quotes

To understand how to view Order Status, it is important to know how Opportunities, Quotes, and Orders are related.

A single Opportunity can have multiple Quotes — for example, if a customer would like to view pricing for a standard configuration MacBook Pro and a MacBook Pro with upgraded components. Only one of those Quotes can be submitted for booking.

The Order Booked Quote can have multiple Orders depending on how the line items on the Quote are scheduled for shipment and fulfilled. For example, if you book a Quote containing both iPads and Configure to Order (CTO) Macs, the iPads (Order Number 1) may ship sooner than the CTO Macs (Order Number 2) which would result in two Order numbers linked to a single Quote.



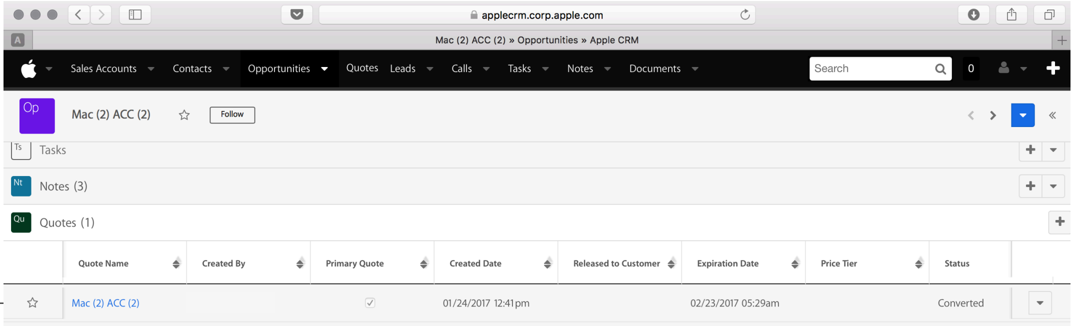
Order Status for Quotes

Quote Order Status	
Created	Quote that has been recently created.
Submitted for Apple Approval	Quote that has been submitted by the Business Team for Apple Approval but has not been reviewed by the Engagement Team.
Inactive	Quote that has been reviewed and not approved by the Engagement Team.
Corporate Approved	Quote that has been reviewed and approved by the Engagement Team and is ready to be sent to SSO for order booking.
Auto Approved	Quote that has been submitted for Apple Approval and was automatically approved by the system and is now ready to send to SSO for booking.
Needs More Information	Quote was reviewed by the Engagement Team and sent back to the Businesss Team with Engagement Team comments to address before resubmitting for Apple Approval.
Sent to Custom Store	Quote was sent by the Business Team to the customer's Custom Store to be booked by the customer.
Sent to SSO	The quote has been sent to SSO for order booking but has not been booked by the SSO team.
Request for Information	When a Quote is sent to SSO for order booking but sent back to the Business Team with SSO Notes that need to be addressed before the order can be booked.
Order Booked	All of the line items on a quote have been booked by the SSO team.
Partial Order Booked	Not all of the line items on a Quote have been booked by the SSO team.

Viewing Order Status for a Quote booked via SSO

Once you have submitted an order to SSO for booking, you may want to check the order status. Follow the steps below to check status of a Quote submitted via SSO.

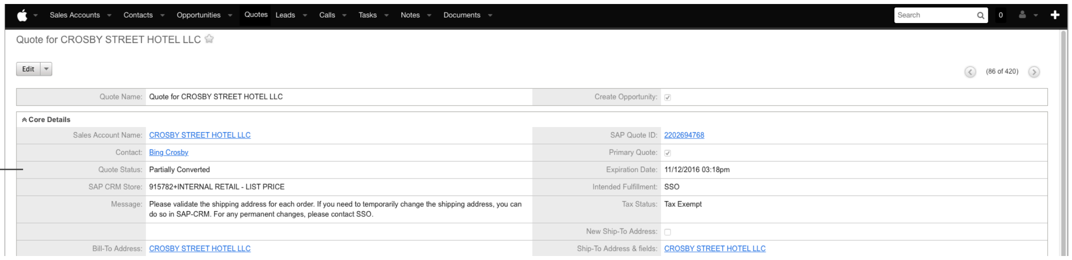
1. From the Opportunity view, select the Quote Name from the Quotes sub-panel.


applecrm.corp.apple.com
Mac (2) ACC (2) » Opportunities » Apple CRM
Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Op
Mac (2) ACC (2)
Follow
Ts
Tasks
Nt
Notes (3)
Qu
Quotes (1)

Quote Name	Created By	Primary Quote	Created Date	Released to Customer	Expiration Date	Price Tier	Status
Mac (2) ACC (2)		☑	01/24/2017 12:41pm		02/23/2017 05:29am		Converted

Select the Quote name

2. Find the Quote Status field on the Quote View. Once SSO books the order, the Quote Status will change from Sent to SSO to either Partially Booked or Order Booked. Partially Booked means that not all of the line items on the Quote have been booked SSO. Order Booked means that all of the line items on the order have been booked by SSO.

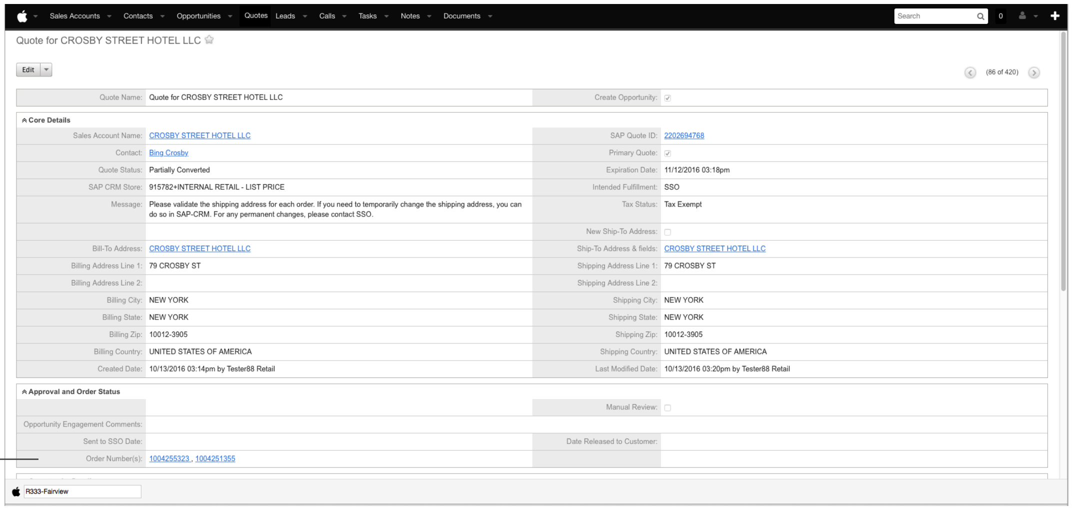

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Edit
(86 of 420)

Quote for CROSBY STREET HOTEL LLC

Quote Name:	Quote for CROSBY STREET HOTEL LLC	Create Opportunity:	☑
Core Details			
Sales Account Name:	CROSBY STREET HOTEL LLC	SAP Quote ID:	2202694768
Contact:	Bing Crosby	Primary Quote:	☑
Quote Status:	Partially Converted	Expiration Date:	11/12/2016 03:18pm
SAP CRM Store:	915782+INTERNAL RETAIL - LIST PRICE	Intended Fulfillment:	SSO
Message:	Please validate the shipping address for each order. If you need to temporarily change the shipping address, you can do so in SAP-CRM. For any permanent changes, please contact SSO.	Tax Status:	Tax Exempt
		New Ship-To Address:	☐
Bill-To Address:	CROSBY STREET HOTEL LLC	Ship-To Address & fields:	CROSBY STREET HOTEL LLC

View the Quote Status here

3. Once some or all of the line items on the order have been converted, the Sales Order numbers associated with the Quote will appear in the Order Number(s) field. Click an order number to view the Order status on apple.com.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
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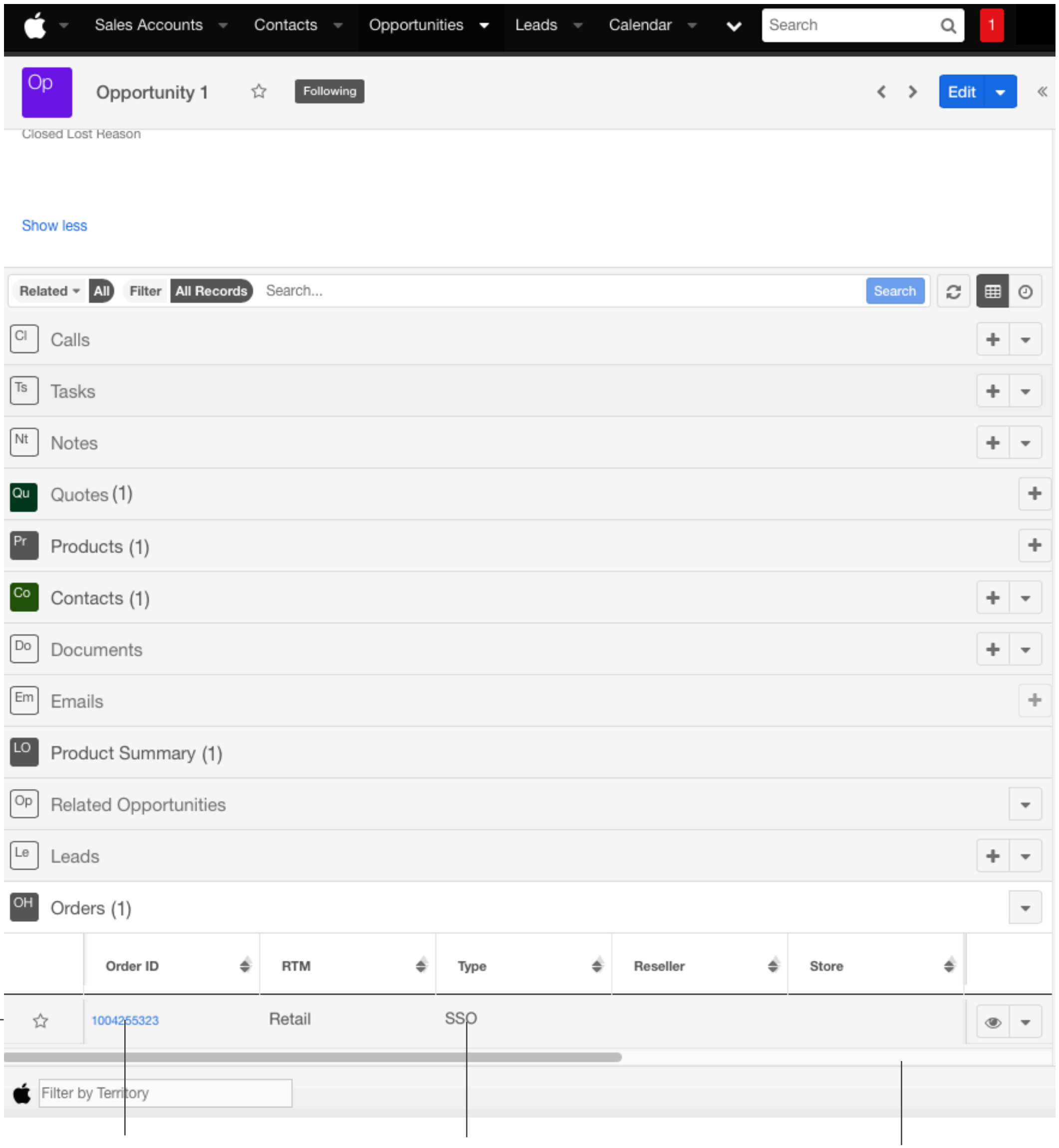
Edit
(86 of 420)
R333-Fairview

Quote for CROSBY STREET HOTEL LLC

Quote Name:	Quote for CROSBY STREET HOTEL LLC	Create Opportunity:	☑
Core Details			
Sales Account Name:	CROSBY STREET HOTEL LLC	SAP Quote ID:	2202694768
Contact:	Bing Crosby	Primary Quote:	☑
Quote Status:	Partially Converted	Expiration Date:	11/12/2016 03:18pm
SAP CRM Store:	915782+INTERNAL RETAIL - LIST PRICE	Intended Fulfillment:	SSO
Message:	Please validate the shipping address for each order. If you need to temporarily change the shipping address, you can do so in SAP-CRM. For any permanent changes, please contact SSO.	Tax Status:	Tax Exempt
		New Ship-To Address:	☐
Bill-To Address:	CROSBY STREET HOTEL LLC	Ship-To Address & fields:	CROSBY STREET HOTEL LLC
Billing Address Line 1:	79 CROSBY ST	Shipping Address Line 1:	79 CROSBY ST
Billing Address Line 2:		Shipping Address Line 2:	
Billing City:	NEW YORK	Shipping City:	NEW YORK
Billing State:	NEW YORK	Shipping State:	NEW YORK
Billing Zip:	10012-3905	Shipping Zip:	10012-3905
Billing Country:	UNITED STATES OF AMERICA	Shipping Country:	UNITED STATES OF AMERICA
Created Date:	10/13/2016 03:14pm by Tester88 Retail	Last Modified Date:	10/13/2016 03:20pm by Tester88 Retail
Approval and Order Status			
		Manual Review:	☐
Opportunity Engagement Comments:			
Sent to SSO Date:		Date Released to Customer:	
Order Number(s):	1004255323 , 1004251355		

View the Sales Order numbers here. Click a Sales Order number to view the status on apple.com

4. Once a Sales Order is created for a Quote, the Sales Order number will also appear on the Orders sub-panel under the Opportunity.


Sales Accounts
Contacts
Opportunities
Leads
Calendar
Search
1
Op
Opportunity 1
Following
Edit
Closed Lost Reason
Show less
Related
All
Filter
All Records
Search...
Search
Cl
Calls
Ts
Tasks
Nt
Notes
Qu
Quotes (1)
Pr
Products (1)
Co
Contacts (1)
Do
Documents
Em
Emails
LO
Product Summary (1)
Op
Related Opportunities
Le
Leads
OH
Orders (1)
Filter by Territory

Order ID	RTM	Type	Reseller	Store
1004255323	Retail	SSO		

View Order Status for all associated orders to that Opportunity in the Orders sub-panel

The Sales Order number is shown under the Order ID column. Click this link to view the order details on apple.com

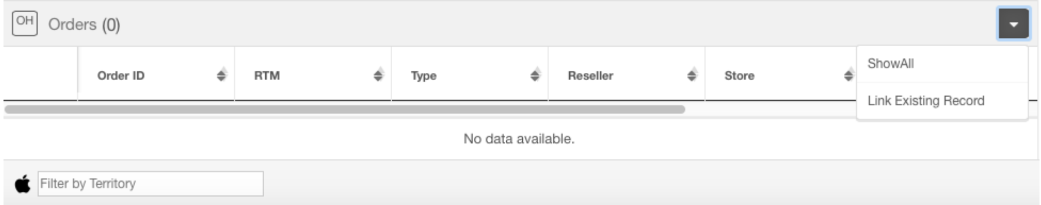
View Order fulfillment type - either SSO or POS depending on where the order was fulfilled

Scroll to the right to view Booked Date and Actual Shipped Date

Linking POS purchases to an Opportunity

Many customers to choose to fulfill their purchase in Store via POS. To associate these purchases to an Opportunity, follow the steps below.

1. From the Orders sub-panel on the Opportunity, select the drop down arrow shown below. Note, this arrow is only available if there are no Orders associated with the Opportunity.

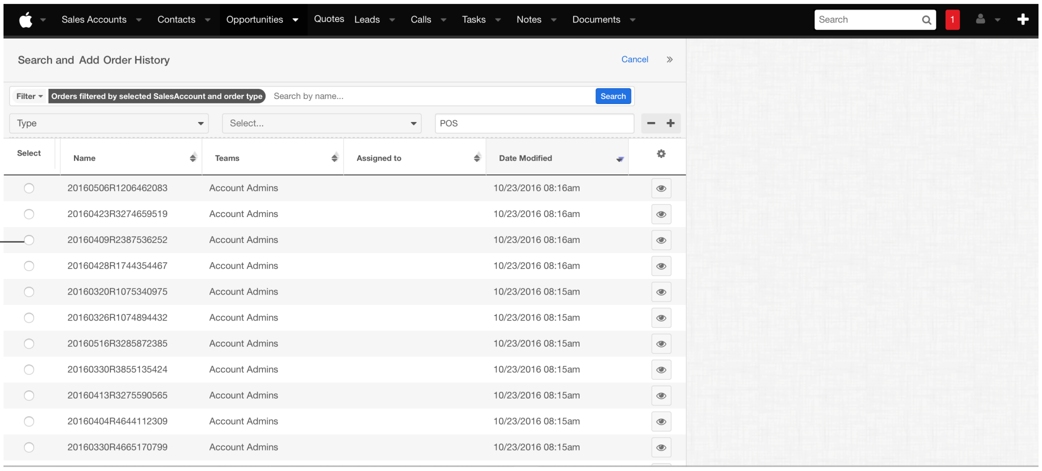

OH
Orders (0)
ShowAll
Link Existing Record
Filter by Territory

Order ID	RTM	Type	Reseller	Store

No data available.

2. Select Link Existing Record and a list of all of the POS transactions associated to the Account on the Opportunity will appear.

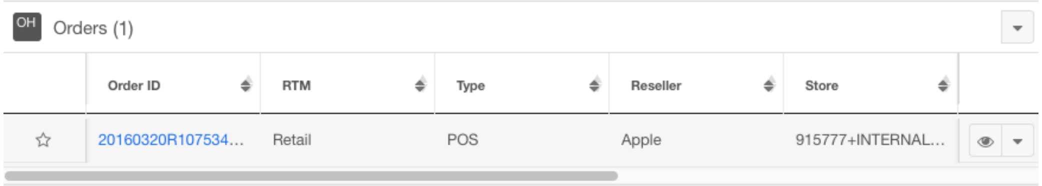
3. Select the radio button next to the order to associate that Order with the Opportunity.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
1
Search and Add Order History
Cancel
Filter
Orders filtered by selected SalesAccount and order type
Search by name...
Search
Type
Select...
POS

Select	Name	Teams	Assigned to	Date Modified
○	20160506R1206462083	Account Admins		10/23/2016 08:16am
○	20160423R3274659519	Account Admins		10/23/2016 08:16am
○	20160409R2387536252	Account Admins		10/23/2016 08:16am
○	20160428R1744354467	Account Admins		10/23/2016 08:16am
○	20160320R1075340975	Account Admins		10/23/2016 08:15am
○	20160326R1074894432	Account Admins		10/23/2016 08:15am
○	20160516R3285872385	Account Admins		10/23/2016 08:15am
○	20160330R3855135424	Account Admins		10/23/2016 08:15am
○	20160413R3275590565	Account Admins		10/23/2016 08:15am
○	20160404R4644112309	Account Admins		10/23/2016 08:15am
○	20160330R4665170799	Account Admins		10/23/2016 08:15am

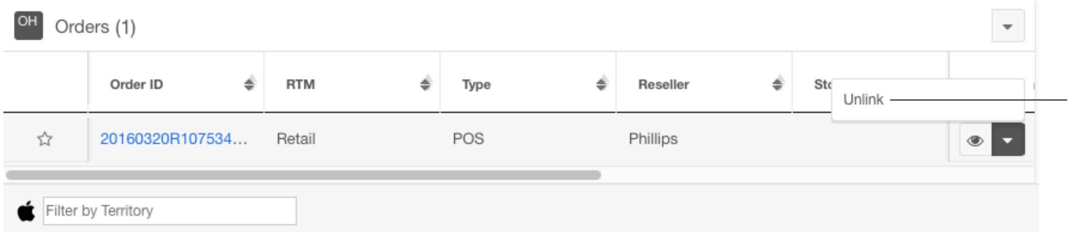
Select the radio button next to a POS purchase to associate that purchase with the Opportunity

4. Once selected, the POS purchase will be associated with that Opportunity and the Products on the Opportunity are updated with the products from the POS transaction.



Order ID	RTM	Type	Reseller	Store
20160320R107534…	Retail	POS	Apple	915777+INTERNAL…

5. If you select the incorrect POS transaction or need to link a different POS transaction instead, select the down arrow next to the POS transaction linked and select Unlink. Then follow the steps above to associate a different POS transaction to the Opportunity.

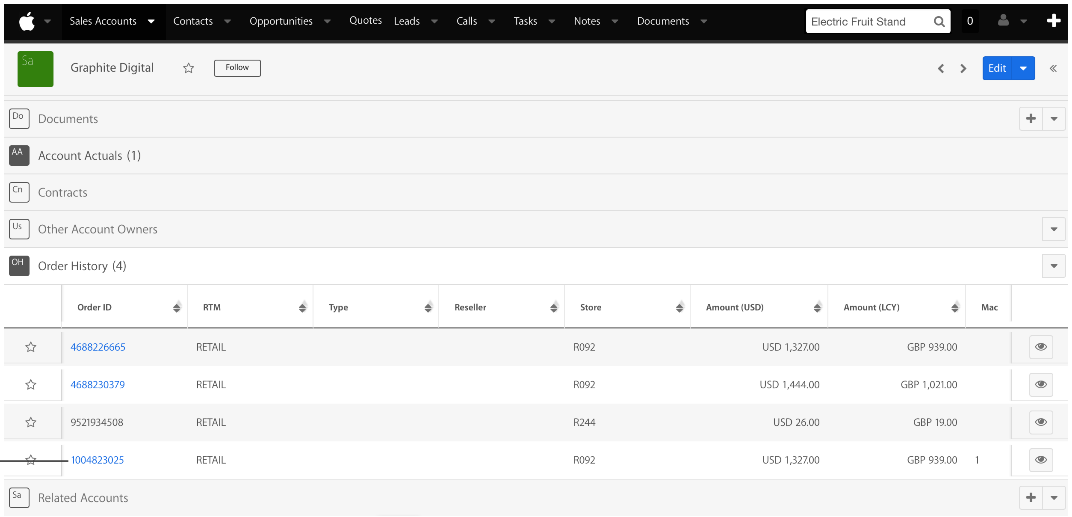

OH
Orders (1)
Unlink
Filter by Territory

Order ID	RTM	Type	Reseller	Sto
20160320R107534…	Retail	POS	Phillips	

Select Unlink to unlink a POS transaction from the Opportunity

Viewing Order History and Order Details

To view Order History and select prior Orders for more detail, view the Order History sub-panel in the Sales Account.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Electric Fruit Stand
0
Sa
Graphite Digital
Follow
Edit
Do
Documents
AA
Account Actuals (1)
Cn
Contracts
Us
Other Account Owners
OH
Order History (4)
Sa
Related Accounts

Order ID	RTM	Type	Reseller	Store	Amount (USD)	Amount (LCY)	Mac
4688226665	RETAIL			R092	USD 1,327.00	GBP 939.00	
4688230379	RETAIL			R092	USD 1,444.00	GBP 1,021.00	
9521934508	RETAIL			R244	USD 26.00	GBP 19.00	
1004823025	RETAIL			R092	USD 1,327.00	GBP 939.00	1

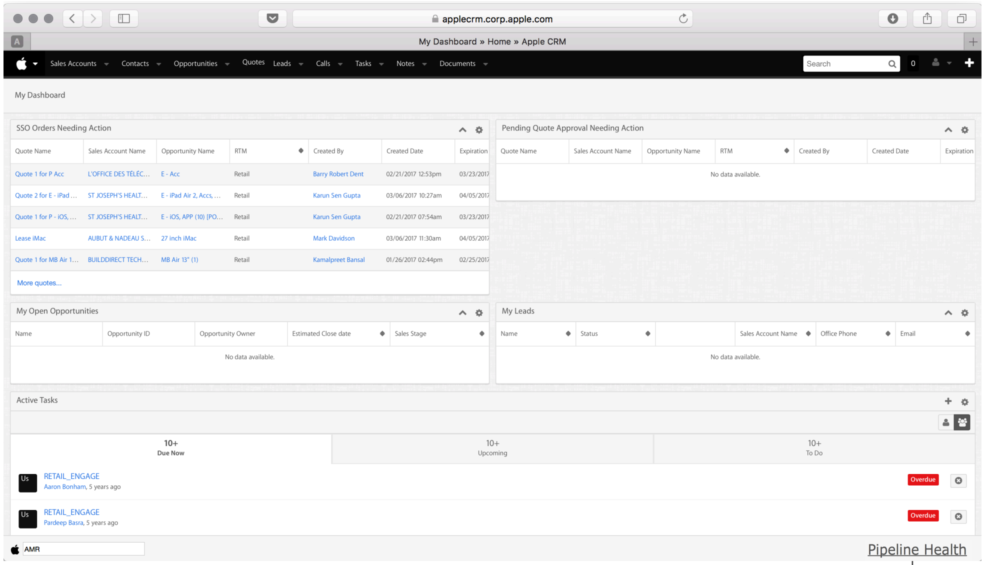
View information in the Order History sub-panel of a Sales Account

Select an Order ID to view details of a prior order

Pipeline Health

Pipeline Health is a robust pipeline reporting tool built into Apple CRM to provide insights into your pipeline of Opportunities. A healthy pipeline is one that is balanced across Opportunity stage, products, and size. While there are many ways Pipeline Health can be used to gauge the health of your pipeline, below are common workflows to get started.

Start by accessing Pipeline Health by clicking the Pipeline Health link on the bottom right hand corner of Apple CRM.



SSO Orders Needing Action

Quote Name	Sales Account Name	Opportunity Name	RTM	Created By	Created Date	Expiration
Quote 1 for P Acc	L'OFFICE DES TÉLÉC…	E - Acc	Retail	Barry Robert Dent	02/21/2017 12:53pm	03/23/2017
Quote 2 for E - iPad …	ST JOSEPH'S HEALT…	E - iPad Air 2, Accs, …	Retail	Karun Sen Gupta	03/06/2017 10:27am	04/05/2017
Quote 1 for P - iOS, …	ST JOSEPH'S HEALT…	E - iOS, APP (10) [PO…	Retail	Karun Sen Gupta	02/21/2017 07:54am	03/23/2017
Lease iMac	AUBUT & NADEAU S…	27 inch iMac	Retail	Mark Davidson	03/06/2017 11:30am	04/05/2017
Quote 1 for MB Air 1…	BUILDDIRECT TECH…	MB Air 13" (1)	Retail	Kamalpreet Bansal	01/26/2017 02:44pm	02/25/2017

More quotes...

Pending Quote Approval Needing Action

Quote Name	Sales Account Name	Opportunity Name	RTM	Created By	Created Date	Expiration

No data available.

My Open Opportunities

Name	Opportunity ID	Opportunity Owner	Estimated Close date	Sales Stage

No data available.

My Leads

Name	Status		Sales Account Name	Office Phone	Email

No data available.

Active Tasks

10+ Due Now	10+ Upcoming	10+ To Do

Us RETAIL_ENGAGE
Aaron Bonham, 5 years ago
Overdue

Us RETAIL_ENGAGE
Pardeep Basra, 5 years ago
Overdue

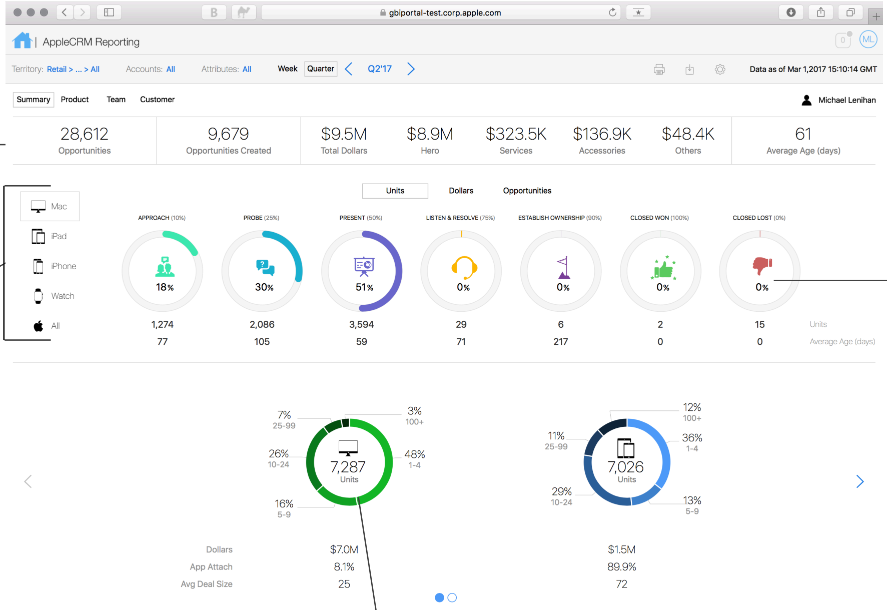
Access Pipeline Health by selecting the Pipeline Health link here

Summary View

The summary view provides a consolidated view of current pipeline metrics such as the number of Opportunities in your pipeline, the number of Opportunities by Opportunity Stage, and the total dollar and percentage of Opportunities by size, known as a deal band.

View a summary of your total pipeline of Opportunities here including number of open Opportunities and total dollar amount.

Change your view of Opportunities that are for all Products or a single product such as Mac.


gbiportal-test.corp.apple.com
AppleCRM Reporting
ML
Week
Quarter
Summary
Product
Team
Customer
Units
Dollars
Opportunities
Mac
iPad
iPhone
Watch
All

Territory: Retail > ... > All

Accounts: All

Attributes: All

Q2'17

Data as of Mar 1,2017 15:10:14 GMT

Michael Lenihan

28,612	9,679	$9.5M	$8.9M	$323.5K	$136.9K	$48.4K	61
Opportunities	Opportunities Created	Total Dollars	Hero	Services	Accessories	Others	Average Age (days)

	APPROACH (10%)	PROBE (25%)	PRESENT (50%)	LISTEN & RESOLVE (75%)	ESTABLISH OWNERSHIP (90%)	CLOSED WON (100%)	CLOSED LOST (0%)
	18%	30%	51%	0%	0%	0%	0%
Units	1,274	2,086	3,594	29	6	2	15
Average Age (days)	77	105	59	71	217	0	0

7%
25-99
3%
100+
26%
10-24
48%
1-4
16%
5-9
7,287
Units
12%
100+
11%
25-99
36%
1-4
29%
10-24
13%
5-9
7,026
Units

Dollars	$7.0M	$1.5M
App Attach	8.1%	89.9%
Avg Deal Size	25	72

View the percentage of Opportunities by Opportunity Stage

View the percentage of your Opportunities by number of units. Size is expressed as a "deal band" where each band covers a range of units.

Product View

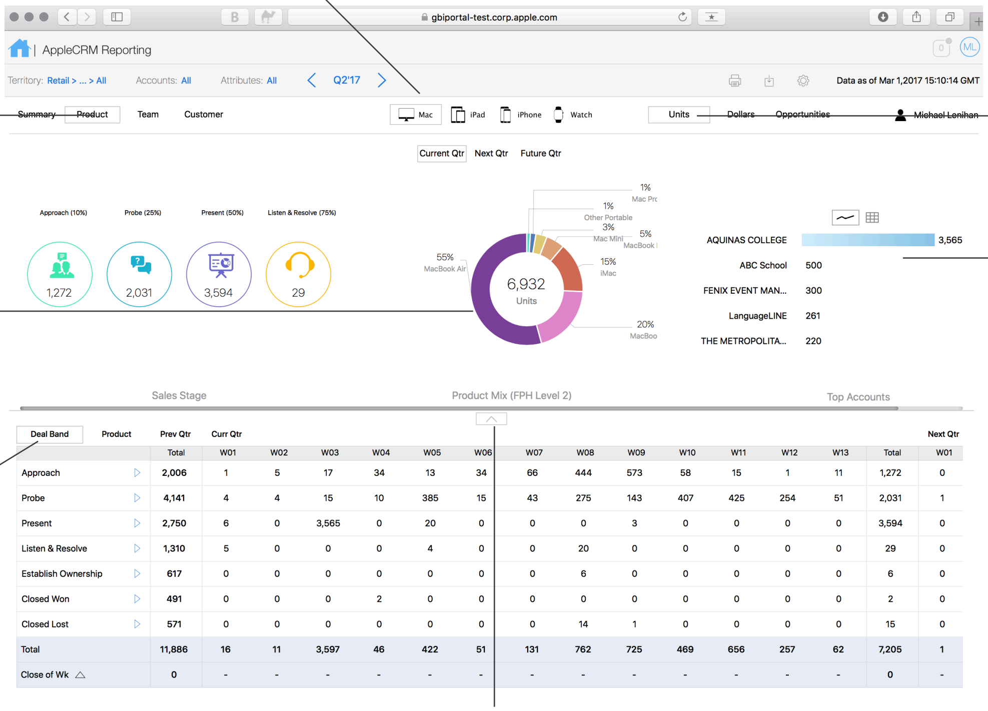
The product view allows you to view your Pipeline metrics for a specific product.

Mac is selected by default. Toggle between different products by selecting a different product.

Opportunities estimated to close in the current quarter are shown by default. Choose the next or a future quarter here.

Toggle from the Summary view to Product view by selecting Product

Toggle between a view of units, dollars, and number of Opportunities


gbiportal-test.corp.apple.com
AppleCRM Reporting
ML
Summary
Product
Team
Customer
Mac
iPad
iPhone
Watch
Units
Dollars
Opportunities
Michael Lenihan
Current Qtr
Next Qtr
Future Qtr
Approach (10%)
1,272
Probe (25%)
2,031
Present (50%)
3,594
Listen & Resolve (75%)
29
6,932
Units
55%
MacBook Air
1%
Mac Prc
1%
Other Portable
3%
Mac Mini
5%
MacBook I
15%
iMac
20%
MacBoo
Sales Stage
Product Mix (FPH Level 2)
Top Accounts

Territory: Retail > ... > All Accounts: All Attributes: All Q2'17

Data as of Mar 1,2017 15:10:14 GMT

AQUINAS COLLEGE	3,565
ABC School	500
FENIX EVENT MAN...	300
LanguageLINE	261
THE METROPOLITA...	220

Deal Band Product

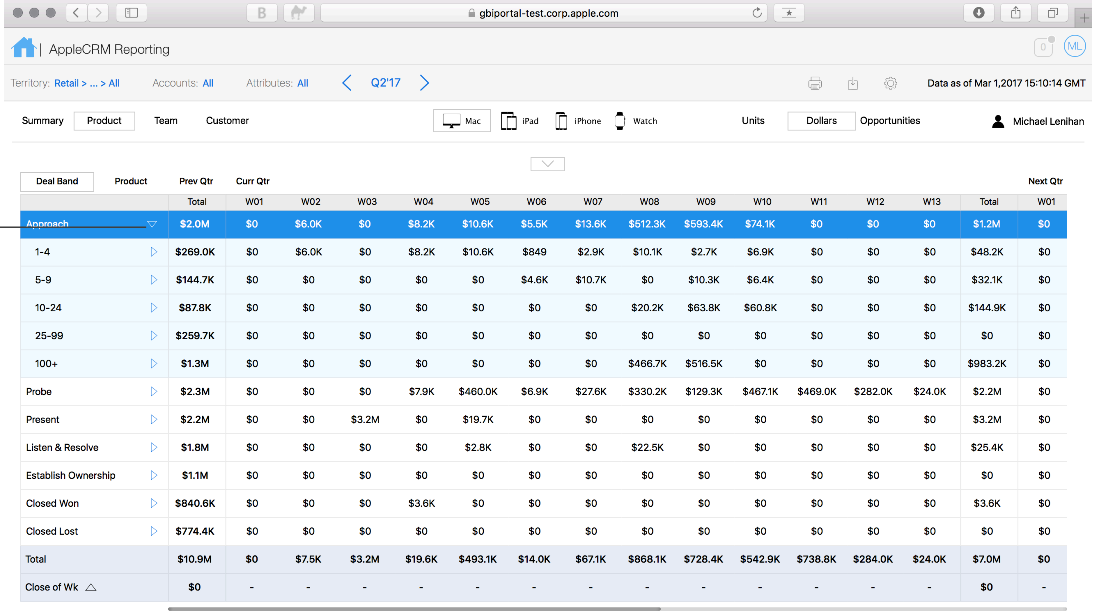
	Prev Qtr	Curr Qtr														Next Qtr
	Total	W01	W02	W03	W04	W05	W06	W07	W08	W09	W10	W11	W12	W13	Total	W01
Approach	2,006	1	5	17	34	13	34	66	444	573	58	15	1	11	1,272	0
Probe	4,141	4	4	15	10	385	15	43	275	143	407	425	254	51	2,031	1
Present	2,750	6	0	3,565	0	20	0	0	0	3	0	0	0	0	3,594	0
Listen & Resolve	1,310	5	0	0	0	4	0	0	20	0	0	0	0	0	29	0
Establish Ownership	617	0	0	0	0	0	0	0	6	0	0	0	0	0	6	0
Closed Won	491	0	0	0	2	0	0	0	0	0	0	0	0	0	2	0
Closed Lost	571	0	0	0	0	0	0	0	14	1	0	0	0	0	15	0
Total	11,886	16	11	3,597	46	422	51	131	762	725	469	656	257	62	7,205	1
Close of Wk △	0	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-

View the percentage of your Pipeline by sub product line

Top Sales Accounts by the product selected are shown here. Select an account to view the top 5 Opportunities for that customer

View total Opportunity count for the previous quarter, current quarter, and future quarter

Select the up arrow to move the table to the top of the screen


gbiportal-test.corp.apple.com
AppleCRM Reporting
ML
Summary
Product
Team
Customer
Mac
iPad
iPhone
Watch
Units
Dollars
Opportunities
Michael Lenihan

Territory: Retail > ... > All Accounts: All Attributes: All Q2'17

Data as of Mar 1,2017 15:10:14 GMT

Deal Band Product

	Prev Qtr	Curr Qtr														Next Qtr
	Total	W01	W02	W03	W04	W05	W06	W07	W08	W09	W10	W11	W12	W13	Total	W01
Approach	$2.0M	$0	$6.0K	$0	$8.2K	$10.6K	$5.5K	$13.6K	$512.3K	$593.4K	$74.1K	$0	$0	$0	$1.2M	$0
1-4	$269.0K	$0	$6.0K	$0	$8.2K	$10.6K	$849	$2.9K	$10.1K	$2.7K	$6.9K	$0	$0	$0	$48.2K	$0
5-9	$144.7K	$0	$0	$0	$0	$0	$4.6K	$10.7K	$0	$10.3K	$6.4K	$0	$0	$0	$32.1K	$0
10-24	$87.8K	$0	$0	$0	$0	$0	$0	$0	$20.2K	$63.8K	$60.8K	$0	$0	$0	$144.9K	$0
25-99	$259.7K	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
100+	$1.3M	$0	$0	$0	$0	$0	$0	$0	$466.7K	$516.5K	$0	$0	$0	$0	$983.2K	$0
Probe	$2.3M	$0	$0	$0	$7.9K	$460.0K	$6.9K	$27.6K	$330.2K	$129.3K	$467.1K	$469.0K	$282.0K	$24.0K	$2.2M	$0
Present	$2.2M	$0	$0	$3.2M	$0	$19.7K	$0	$0	$0	$0	$0	$0	$0	$0	$3.2M	$0
Listen & Resolve	$1.8M	$0	$0	$0	$0	$2.8K	$0	$0	$22.5K	$0	$0	$0	$0	$0	$25.4K	$0
Establish Ownership	$1.1M	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Closed Won	$840.6K	$0	$0	$0	$3.6K	$0	$0	$0	$0	$0	$0	$0	$0	$0	$3.6K	$0
Closed Lost	$774.4K	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Total	$10.9M	$0	$7.5K	$3.2M	$19.6K	$493.1K	$14.0K	$67.1K	$868.1K	$728.4K	$542.9K	$738.8K	$284.0K	$24.0K	$7.0M	$0
Close of Wk △	$0	-	-	-	-	-	-	-	-	-	-	-	-	-	$0	-

Select the down arrow to view Opportunities in that Opportunity stage by deal band

Customer View

The Customer View will show performance of your most loyal accounts. This is a helpful view for Leaders to see who their most loyal customers and for Business Team members to quickly access reports and insights on their most loyal customers.

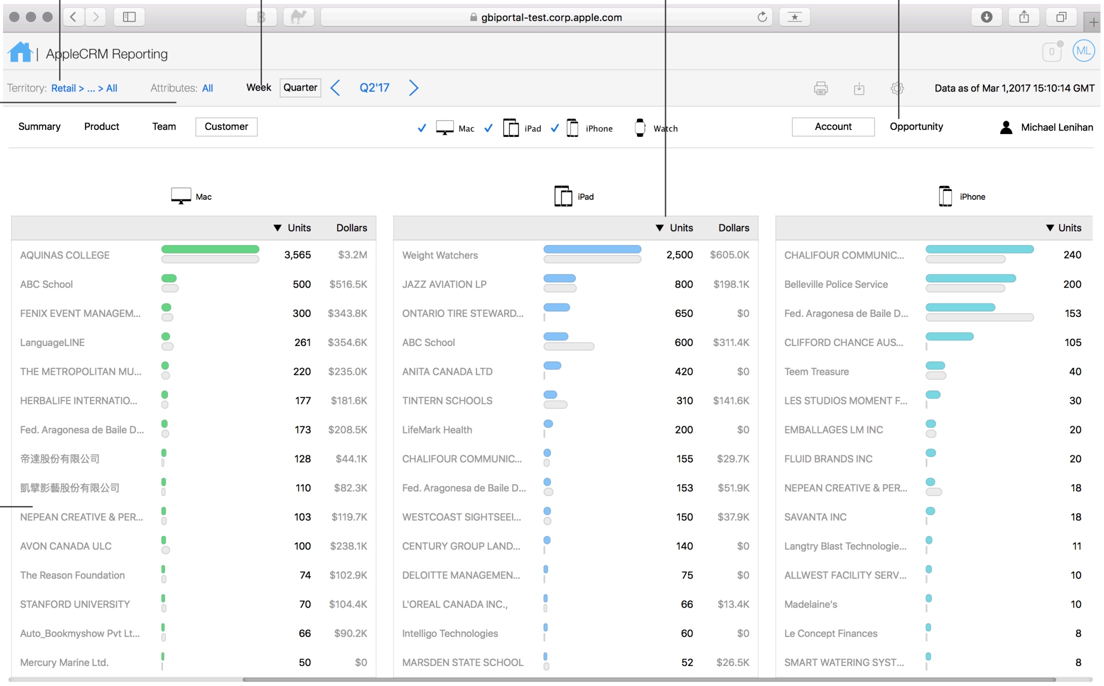
Filter accounts by Territory here

View performance over a week or quarter

Select Units or Dollars to sort by either metric

View the Opportunity detail behind Account performance by toggling to Opportunity here

Select the customer tab to access Customer View


gbiportal-test.corp.apple.com
AppleCRM Reporting
ML
Territory: Retail > ... > All
Attributes: All
Week
Quarter
Q2'17
Data as of Mar 1,2017 15:10:14 GMT
Summary
Product
Team
Customer
✓ Mac
✓ iPad
✓ iPhone
Watch
Account
Opportunity
Michael Lenihan

View performance of your most loyal customers by all products and each individual product line

Mac

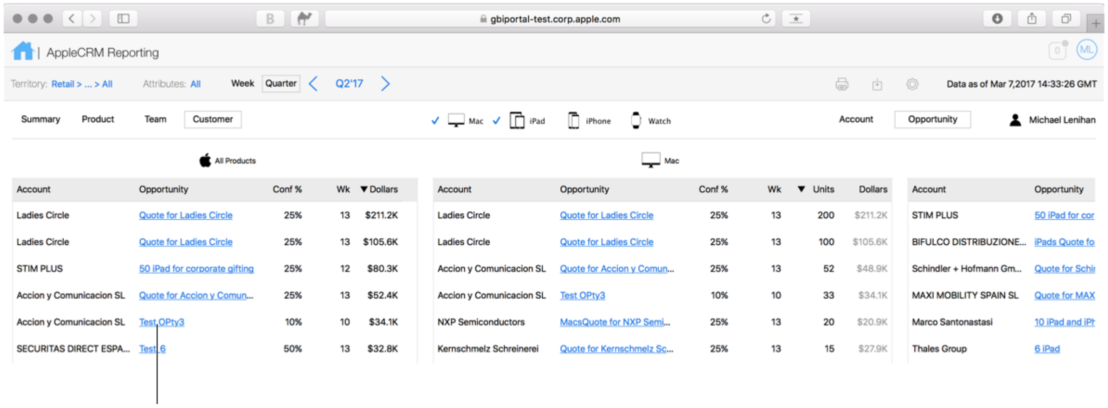
	▼ Units	Dollars
AQUINAS COLLEGE	3,565	$3.2M
ABC School	500	$516.5K
FENIX EVENT MANAGEM...	300	$343.8K
LanguageLINE	261	$354.6K
THE METROPOLITAN MU...	220	$235.0K
HERBALIFE INTERNATIO...	177	$181.6K
Fed. Aragonesa de Baile D...	173	$208.5K
帝達股份有限公司	128	$44.1K
凱擘影藝股份有限公司	110	$82.3K
NEPEAN CREATIVE & PER...	103	$119.7K
AVON CANADA ULC	100	$238.1K
The Reason Foundation	74	$102.9K
STANFORD UNIVERSITY	70	$104.4K
Auto_Bookmyshow Pvt Lt...	66	$90.2K
Mercury Marine Ltd.	50	$0

iPad

	▼ Units	Dollars
Weight Watchers	2,500	$605.0K
JAZZ AVIATION LP	800	$198.1K
ONTARIO TIRE STEWARD...	650	$0
ABC School	600	$311.4K
ANITA CANADA LTD	420	$0
TINTERN SCHOOLS	310	$141.6K
LifeMark Health	200	$0
CHALIFOUR COMMUNIC...	155	$29.7K
Fed. Aragonesa de Baile D...	153	$51.9K
WESTCOAST SIGHTSEEI...	150	$37.9K
CENTURY GROUP LAND...	140	$0
DELOITTE MANAGEMEN...	75	$0
L'OREAL CANADA INC.,	66	$13.4K
Intelligo Technologies	60	$0
MARSDEN STATE SCHOOL	52	$26.5K

iPhone

	▼ Units
CHALIFOUR COMMUNIC...	240
Belleville Police Service	200
Fed. Aragonesa de Baile D...	153
CLIFFORD CHANCE AUS...	105
Teem Treasure	40
LES STUDIOS MOMENT F...	30
EMBALLAGES LM INC	20
FLUID BRANDS INC	20
NEPEAN CREATIVE & PER...	18
SAVANTA INC	18
Langtry Blast Technologie...	11
ALLWEST FACILITY SERV...	10
Madelaine's	10
Le Concept Finances	8
SMART WATERING SYST...	8


gbiportal-test.corp.apple.com
AppleCRM Reporting
ML
Territory: Retail > ... > All
Attributes: All
Week
Quarter
Q2'17
Data as of Mar 7,2017 14:33:26 GMT
Summary
Product
Team
Customer
✓ Mac
✓ iPad
iPhone
Watch
Account
Opportunity
Michael Lenihan

All Products

Account	Opportunity	Conf %	Wk	▼ Dollars
Ladies Circle	Quote for Ladies Circle	25%	13	$211.2K
Ladies Circle	Quote for Ladies Circle	25%	13	$105.6K
STIM PLUS	50 iPad for corporate gifting	25%	12	$80.3K
Accion y Comunicacion SL	Quote for Accion y Comun...	25%	13	$52.4K
Accion y Comunicacion SL	Test OPty3	10%	10	$34.1K
SECURITAS DIRECT ESPA...	Test 6	50%	13	$32.8K

Mac

Account	Opportunity	Conf %	Wk	▼ Units	Dollars
Ladies Circle	Quote for Ladies Circle	25%	13	200	$211.2K
Ladies Circle	Quote for Ladies Circle	25%	13	100	$105.6K
Accion y Comunicacion SL	Quote for Accion y Comun...	25%	13	52	$48.9K
Accion y Comunicacion SL	Test OPty3	10%	10	33	$34.1K
NXP Semiconductors	MacsQuote for NXP Semi...	25%	13	20	$20.9K
Kernschmelz Schreinerei	Quote for Kernschmelz Sc...	25%	13	15	$27.9K

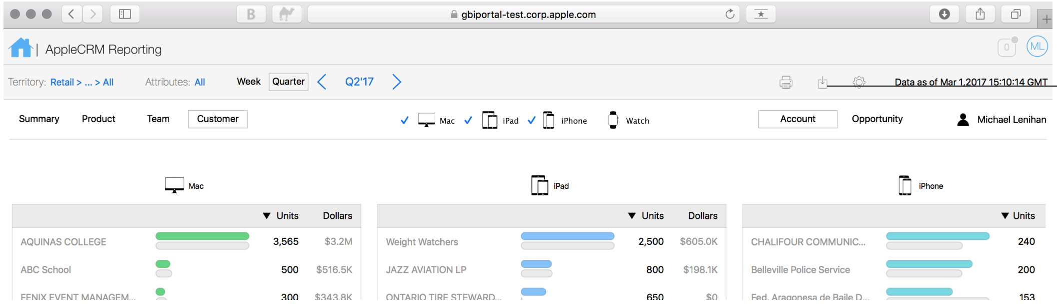
Account	Opportunity
STIM PLUS	50 iPad for cor
BIFULCO DISTRIBUZIONE...	iPads Quote fo
Schindler + Hofmann Gm...	Quote for Schi
MAXI MOBILITY SPAIN SL	Quote for MAX
Marco Santonastasi	10 iPad and iPh
Thales Group	6 iPad

By clicking an Opportunity name or Customer name, you will return to Apple CRM to view either the Opportunity or Sales Account details

Download and Export Reports

Pipeline Health allows you to download and export reports to Excel or Keynote for further analysis or presentations.

1. If exporting is available for your view, select the Share button as shown below.


gbiportal-test.corp.apple.com
AppleCRM Reporting
Territory: Retail > ... > All
Attributes: All
Week
Quarter
Q2'17
Data as of Mar 1,2017 15:10:14 GMT
Summary
Product
Team
Customer
Mac
iPad
iPhone
Watch
Account
Opportunity
Michael Lenihan

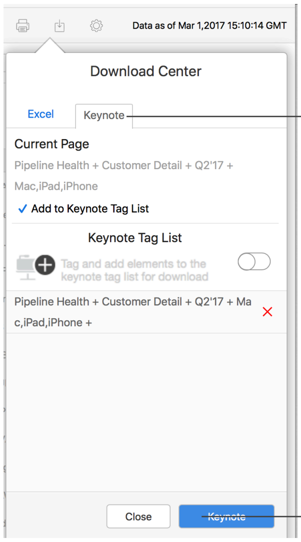
Mac	Units	Dollars
AQUINAS COLLEGE	3,565	$3.2M
ABC School	500	$516.5K
FENIX EVENT MANAGEM...	300	$343.8K

iPad	Units	Dollars
Weight Watchers	2,500	$605.0K
JAZZ AVIATION LP	800	$198.1K
ONTARIO TIRE STEWARD...	650	$0

iPhone	Units
CHALIFOUR COMMUNIC...	240
Belleville Police Service	200
Fed. Aragonesa de Baile D...	153

Select the Share button here

2. Select Excel or Keynote. If selecting Keynote, you have the ability to download the entire page or sections of the page. If selecting Excel, select the blue Excel button to download the report into Excel.


Data as of Mar 1,2017 15:10:14 GMT
Download Center
Excel
Keynote
Current Page
Pipeline Health + Customer Detail + Q2'17 + Mac,iPad,iPhone
✓ Add to Keynote Tag List
Keynote Tag List
Tag and add elements to the keynote tag list for download
Pipeline Health + Customer Detail + Q2'17 + Mac,iPad,iPhone +
Close
Keynote

Select to download in Excel or Keynote

Select the blue button to export your report

⚠ *PIPELINE DETAILS ARE FOR INTERNAL USE ONLY* Remember that Pipeline details are for internal team facing documents only, and are never to be shared with customers or non-Apple partners.

Introductions and Lead Management

Overview

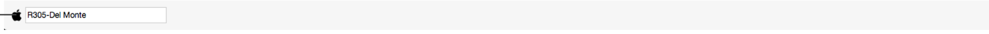
Introductions that are created from EasyPay, Mobile Genius, Concierge or through the Web Form available on apple.com/retail/business are sent to Apple CRM where they become Leads. Since Apple CRM will be used by several Apple teams including Enterprise and Education, the Leads language aligns to the way other Apple wide teams talk about this stage of the customer journey. Introductions as a term will continue to be used in Store with our front of house teams. However, in Apple CRM, these Introductions will be known as Leads.

Leads (Introductions) are the beginning of a customer's relationship with Apple and document the engagement our teams have with a new business customer. This section will help you create, manage, and edit Leads.

Viewing New Leads (Introductions) for your Store

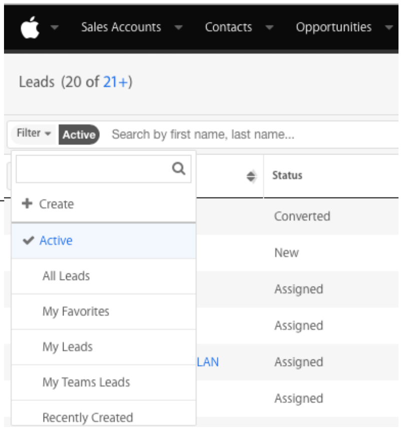
Viewing New Leads is an important and frequent workflow teams use to follow up with and meet new customers. In this section, you will learn how to create a Filtered Search to view a list of New Leads and save this Filtered Search to easily view New Leads daily. This workflow can be applied to other types of Leads such as those that are In Process or Assigned.

1. Start by ensuring your Store is selected in the Territory Filter at the bottom of the Apple CRM screen.


R305-Del Monte

Ensure your Territory or Store is selected in the Territory Filter

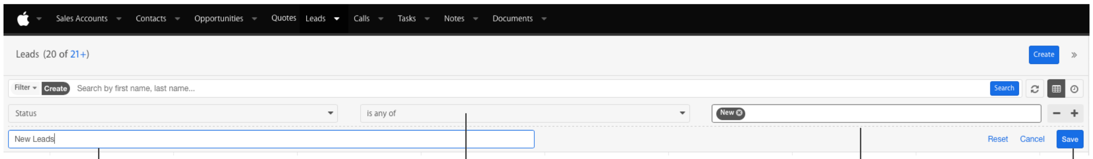
2. In the Leads module List View, click the Filter drop down menu and select Create.


Sales Accounts
Contacts
Opportunities
Leads (20 of 21+)
Filter
Active
Search by first name, last name...
Status
Create
Active
All Leads
My Favorites
My Leads
My Teams Leads
Recently Created
Converted
New
Assigned
Assigned
LAN
Assigned
Assigned

Select Create from the Filter drop down menu

3. Select Status as the Filter Criteria, "is any of" as the second tab (Operator), and New as the Filter Item.

4. Name the Filter and select Save on the far right to use this Filter to search for new Leads in the future.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Leads (20 of 21+)
Create
Filter
Create
Search by first name, last name...
Search
Status
is any of
New
New Leads
Reset
Cancel
Save

Provide a name for the Filter (e.g. New Leads)

Select "is any of"

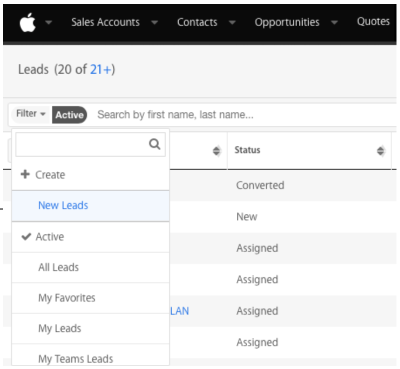
Choose New as the Filter Item

Save this Filter for future use

5. To access your saved Filters, click the Filter drop down menu and select the saved Filter name.

6. As part of your daily workflow to view New Leads (Introductions) created in your Store, access the New Leads Filter you created in steps 1-4. This will produce a list of Leads with New status that have not been actioned and need a follow up.

To view New Leads in the future, select the saved Filter. You will access this saved Filter daily to view New Leads created in your Store that need a follow up


Sales Accounts
Contacts
Opportunities
Quotes
Leads (20 of 21+)
Filter
Active
Search by first name, last name...
Create
New Leads
Active
All Leads
My Favorites
My Leads
My Teams Leads
Status
Converted
New
Assigned
Assigned
LAN
Assigned
Assigned

7. For each New Lead on the list, the next step is to either take action to follow up or assign the Lead to a member of your team.

8. In addition to the New Leads workflow, you can use steps 1-4 to create saved Filters for common ways to search for Leads such as those that were Assigned the day prior or those that were Converted in the past week.

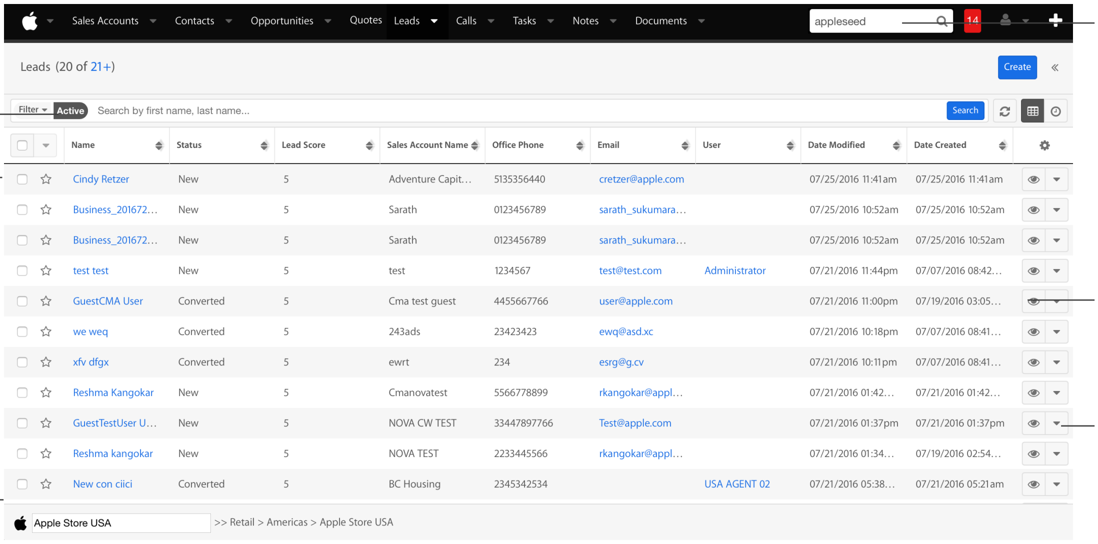
Searching for a Specific Lead using Filter Search or Global Search

1. In the Leads module List View, use the Filter bar to narrow the list of Leads to a specific Sales Account, Contact or other specific search criteria. When using the Filter bar, all Leads (Archived and active) will be included despite not showing up in the active Leads view.

2. Alternatively, you can use Global Search to search. Remember that Global Search searches across the system and will return a broader range of results than using Filter within the Leads module.

3. Once you find the Lead, you can Follow the Lead by clicking the drop down menu next to the Lead record in the List View.

4. Click on a Lead to see the Lead Detail view with more details about the Lead or to Convert the Lead to a Sales Account. To easily reference the Lead in the future, Favorite the Lead by clicking the Star icon at the top of the Lead.



Leads (20 of 21+)

☐		Name	Status	Lead Score	Sales Account Name	Office Phone	Email	User	Date Modified	Date Created
☐	☆	Cindy Retzer	New	5	Adventure Capit…	5135356440	cretzer@apple.com		07/25/2016 11:41am	07/25/2016 11:41am
☐	☆	Business_201672…	New	5	Sarath	0123456789	sarath_sukumara…		07/25/2016 10:52am	07/25/2016 10:52am
☐	☆	Business_201672…	New	5	Sarath	0123456789	sarath_sukumara…		07/25/2016 10:52am	07/25/2016 10:52am
☐	☆	test test	New	5	test	1234567	test@test.com	Administrator	07/21/2016 11:44pm	07/07/2016 08:42…
☐	☆	GuestCMA User	Converted	5	Cma test guest	4455667766	user@apple.com		07/21/2016 11:00pm	07/19/2016 03:05…
☐	☆	we weq	Converted	5	243ads	23423423	ewq@asd.xc		07/21/2016 10:18pm	07/07/2016 08:41…
☐	☆	xfv dfgx	Converted	5	ewrt	234	esrg@g.cv		07/21/2016 10:11pm	07/07/2016 08:41…
☐	☆	Reshma Kangokar	New	5	Cmanovatest	5566778899	rkangokar@appl…		07/21/2016 01:42…	07/21/2016 01:42…
☐	☆	GuestTestUser U…	New	5	NOVA CW TEST	33447897766	Test@apple.com		07/21/2016 01:37pm	07/21/2016 01:37pm
☐	☆	Reshma kangokar	New	5	NOVA TEST	2233445566	rkangokar@appl…		07/21/2016 01:34…	07/19/2016 02:54…
☐	☆	New con ciici	Converted	5	BC Housing	2345342534		USA AGENT 02	07/21/2016 05:38…	07/21/2016 05:21am

Apple Store USA >> Retail > Americas > Apple Store USA

Use the Filter bar to narrow down the list of Leads

List of incoming Leads

Or use Global Search to search for a Lead

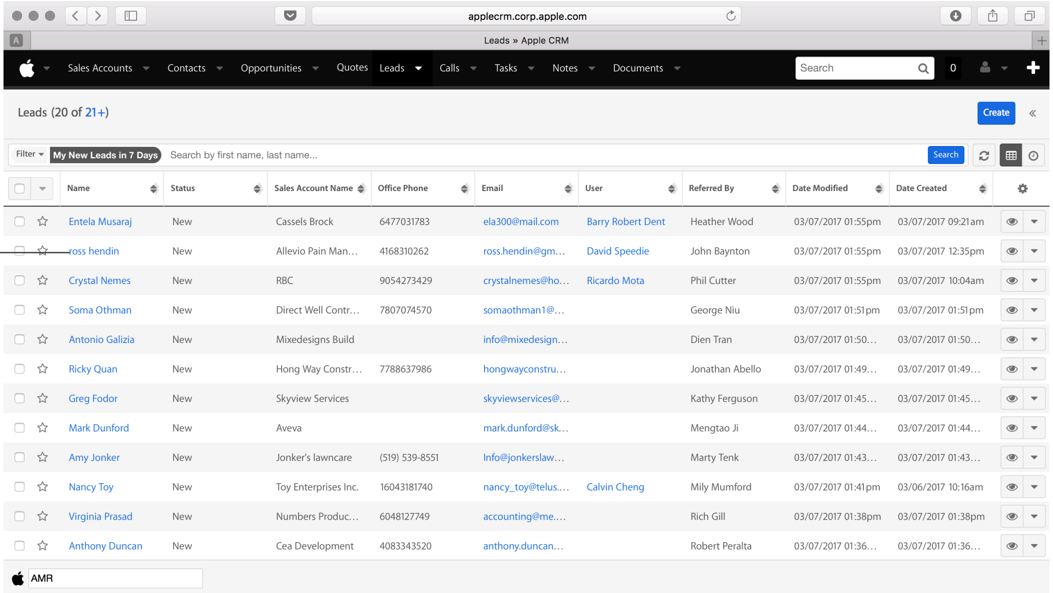
Preview a Lead in the Intelligence Pane by clicking this icon

Follow a Lead by clicking the drop down menu

Converting (Qualifying) Leads

In Apple CRM, qualifying an Introduction to a Company is known as Converting a Lead to a Sales Account. To convert a Lead, the New Contact, New Sales Account and New Sales Account Location sections must be completed. Optionally, an Opportunity can be added. Start by clicking a Lead from the Lead List View.

Select a Lead from the Lead List View to see the Lead Detail View



Leads (20 of 21+)

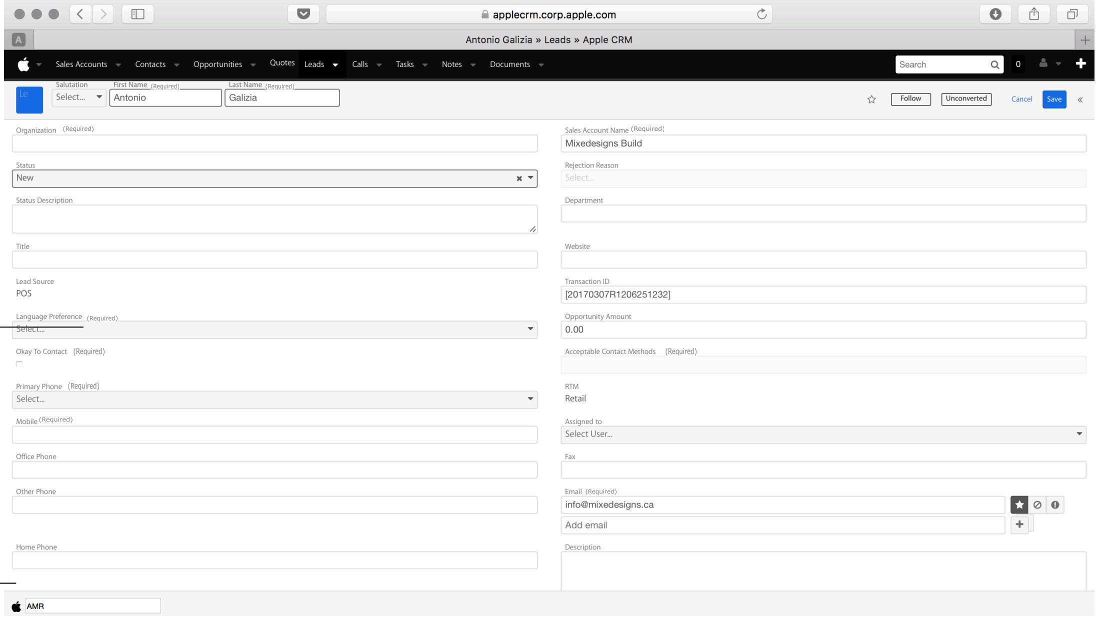
Name	Status	Sales Account Name	Office Phone	Email	User	Referred By	Date Modified	Date Created
Entela Musaraj	New	Cassels Brock	6477031783	ela300@mail.com	Barry Robert Dent	Heather Wood	03/07/2017 01:55pm	03/07/2017 09:21am
ross hendin	New	Allevio Pain Man…	4168310262	ross.hendin@gm…	David Speedie	John Baynton	03/07/2017 01:55pm	03/07/2017 12:35pm
Crystal Nemes	New	RBC	9054273429	crystalnemes@ho…	Ricardo Mota	Phil Cutter	03/07/2017 01:55pm	03/07/2017 10:04am
Soma Othman	New	Direct Well Contr…	7807074570	somaothman1@…		George Niu	03/07/2017 01:51pm	03/07/2017 01:51pm
Antonio Galizia	New	Mixedesigns Build		info@mixedesign…		Dien Tran	03/07/2017 01:50…	03/07/2017 01:50…
Ricky Quan	New	Hong Way Constr…	7788637986	hongwayconstru…		Jonathan Abello	03/07/2017 01:49…	03/07/2017 01:49…
Greg Fodor	New	Skyview Services		skyviewservices@…		Kathy Ferguson	03/07/2017 01:45…	03/07/2017 01:45…
Mark Dunford	New	Aveva		mark.dunford@sk…		Mengtao Ji	03/07/2017 01:44…	03/07/2017 01:44…
Amy Jonker	New	Jonker's lawncare	(519) 539-8551	Info@jonkerslaw…		Marty Tenk	03/07/2017 01:43…	03/07/2017 01:43…
Nancy Toy	New	Toy Enterprises Inc.	16043181740	nancy_toy@telus.…	Calvin Cheng	Mily Mumford	03/07/2017 01:41pm	03/06/2017 10:16am
Virginia Prasad	New	Numbers Produc…	6048127749	accounting@me.…		Rich Gill	03/07/2017 01:38pm	03/07/2017 01:38pm
Anthony Duncan	New	Cea Development	4083343520	anthony.duncan…		Robert Peralta	03/07/2017 01:36…	03/07/2017 01:36…

ENSURE DATA IS VALID AND ACCURATE BEFORE CONVERTING LEAD When converting a Lead into a Sales Account, it is important to make sure the information entered for the Contact, Sales Account and Sales Account Location is accurate and valid. Before converting a Lead to a Sales Account, make sure you have gathered and validated the necessary information from the customer to complete the Lead conversion.

Complete the Required Fields in the Lead Detail View

1. From the Lead Detail View, select the blue Edit button in the upper right hand corner.

2. Complete all of the Required fields. Fields that are Required will show (Required) next to the Field name.


applecrm.corp.apple.com
Antonio Galizia » Leads » Apple CRM
Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Follow
Unconverted
Cancel
Save
AMR

Salutation: Select...
First Name (Required): Antonio
Last Name (Required): Galizia
Organization (Required):
Sales Account Name (Required): Mixedesigns Build
Status: New
Rejection Reason: Select...
Status Description:
Department:
Title:
Website:
Lead Source: POS
Transaction ID: [20170307R1206251232]
Language Preference (Required): Select...
Opportunity Amount: 0.00
Okay To Contact (Required): ☐
Acceptable Contact Methods (Required):
Primary Phone (Required): Select...
RTM: Retail
Mobile (Required):
Assigned to: Select User...
Office Phone:
Fax:
Other Phone:
Email (Required): info@mixedesigns.ca
Add email
Home Phone:
Description:

Complete all of the fields that show (Required)

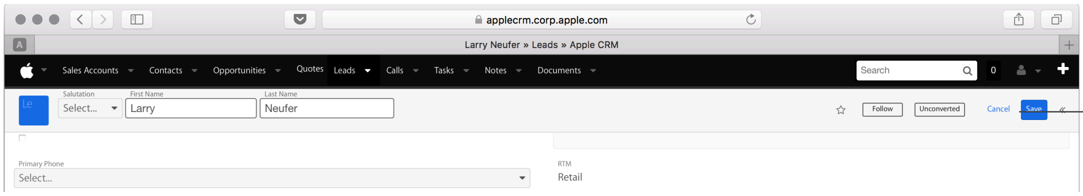
Select Show More to access additional Required fields

The following fields are required:

- First Name
- Last Name
- Sales Account Name
- Organization Name
- Language Preference
- Email
- Primary Phone (and a corresponding Phone number for the Primary Phone)
- Acceptable Contact Methods
- Okay to Contact Checkbox
- Primary Account Owner
- Account Team
- Primary Address

Completing Lead Conversion

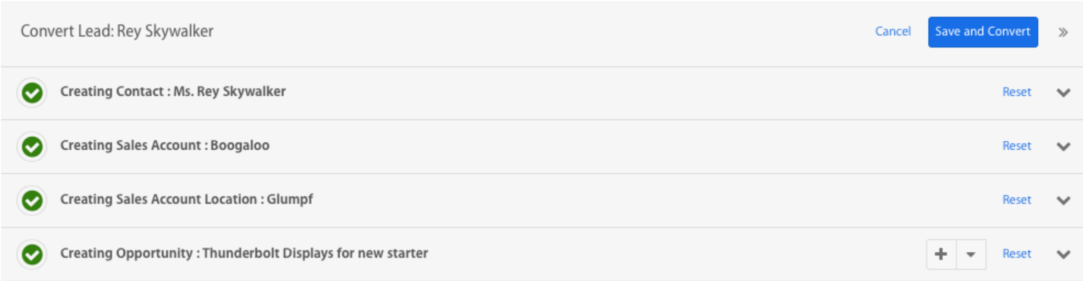
1. When all of the Required fields are completed, select Save.


applecrm.corp.apple.com
Larry Neufer » Leads » Apple CRM
Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Follow
Unconverted
Cancel
Save

Salutation: Select...
First Name: Larry
Last Name: Neufer
Primary Phone: Select...
RTM: Retail

Select Save here

2. Select the blue drop down arrow next to Edit. Select Convert. If all of the Required fields have been completed, all four sections of the Convert Lead view will have a green tick on the left hand side as shown below.


Cancel
Save and Convert
Reset
Reset
Reset
Reset

Convert Lead: Rey Skywalker

✓ **Creating Contact : Ms. Rey Skywalker**

✓ **Creating Sales Account : Boogaloo**

✓ **Creating Sales Account Location : Glumpf**

✓ **Creating Opportunity : Thunderbolt Displays for new starter**

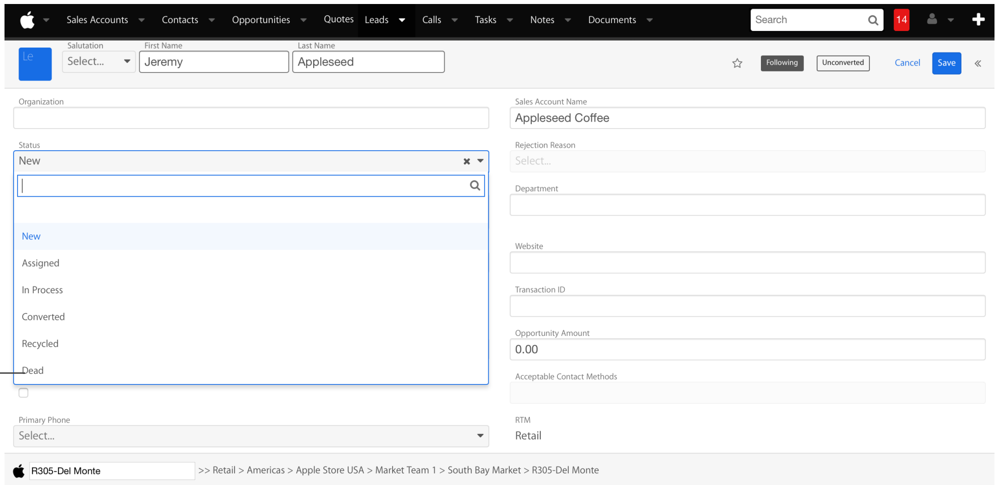
3. Click Save and Convert to convert the Lead into a new or existing Sales Account.

4. You will then be taken back to the Lead page once converted.

Archiving Lead (Moving Lead to Archived Status)

1. When viewing a Lead, click the blue Edit button.

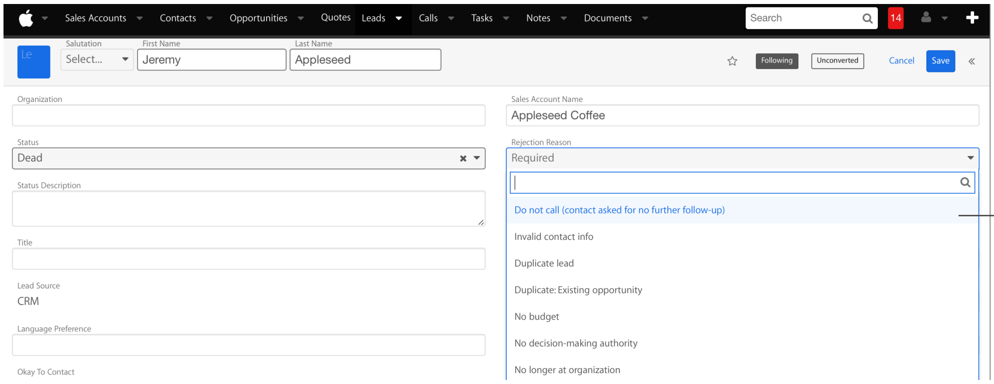
2. Find the Lead Status drop down menu. Select Archived.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Le
Following
Unconverted
Cancel
Save
New
Assigned
In Process
Converted
Recycled
Dead

Salutation: Select...
First Name: Jeremy
Last Name: Appleseed
Organization:
Sales Account Name: Appleseed Coffee
Status: New
Rejection Reason: Select...
Department:
Website:
Transaction ID:
Opportunity Amount: 0.00
Acceptable Contact Methods:
Primary Phone: Select...
RTM: Retail
R305-Del Monte >> Retail > Americas > Apple Store USA > Market Team 1 > South Bay Market > R305-Del Monte

Select Archived from the Status drop down menu

3. Once you select Archived, select a Reason for why the Lead was turned to Archived status.

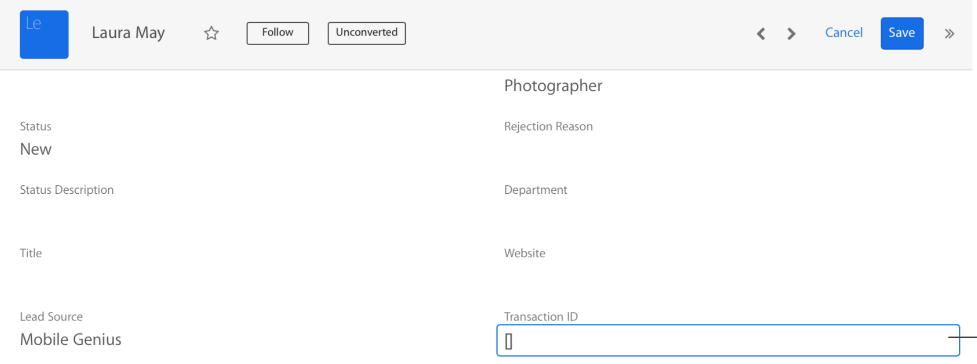

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Le
Following
Unconverted
Cancel
Save
Do not call (contact asked for no further follow-up)
Invalid contact info
Duplicate lead
Duplicate: Existing opportunity
No budget
No decision-making authority
No longer at organization

Salutation: Select...
First Name: Jeremy
Last Name: Appleseed
Organization:
Sales Account Name: Appleseed Coffee
Status: Dead
Rejection Reason: Required
Status Description:
Title:
Lead Source: CRM
Language Preference:
Okay To Contact

Select a Reject Reason (Remember do not use this language or share these reasons with customers)

Linking an Introduction with Transaction to an existing Sales Account

1. In the Lead details view, select the Transaction ID field.
2. Enter the receipt number from the POS transaction.
3. When converting the Lead, link the Lead to the correct Sales Account and the transaction will be recorded in the Sales Account.


Le
Laura May
Follow
Unconverted
Cancel
Save

Photographer

Status
New

Rejection Reason

Status Description

Department

Title

Website

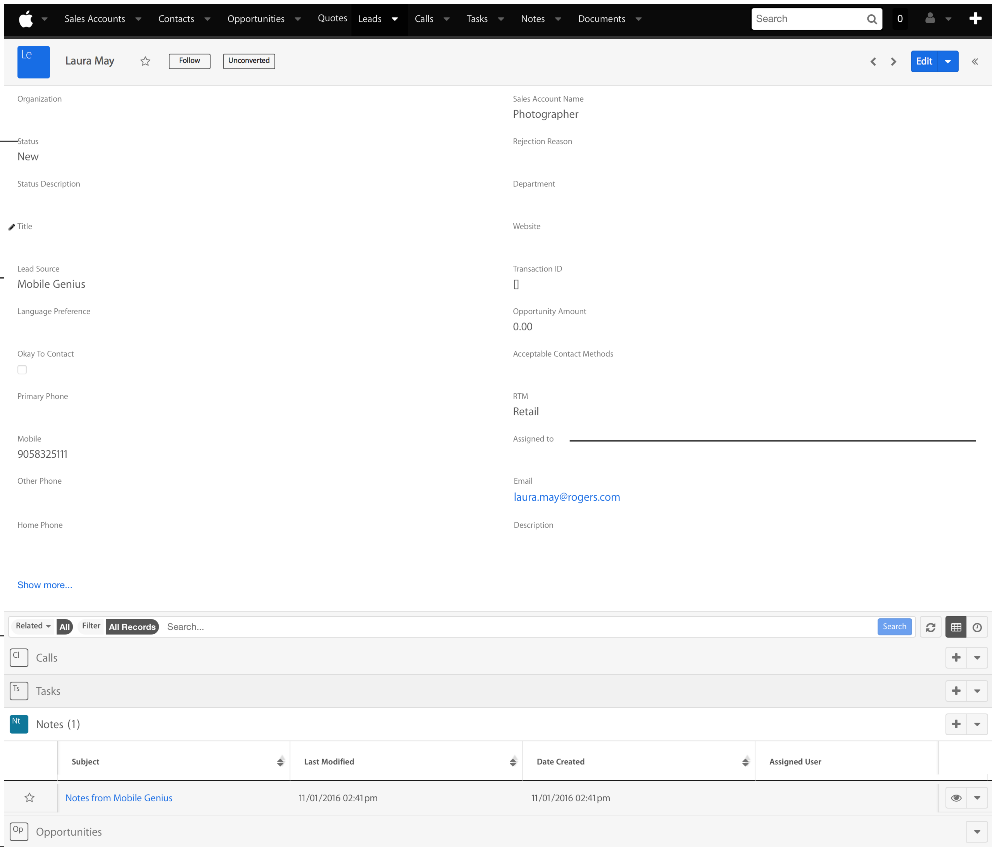
Lead Source
Mobile Genius

Transaction ID
▯

Enter a POS transaction receipt number into the Transaction ID field

Lead Record Detail View

To view more details of a Lead, select the Lead from the List View. Here, you can view additional information that is not available in List View such as Lead Source and Notes.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
0
Le
Laura May
Follow
Unconverted
Edit
Related
All
Filter
All Records
Search...
Search
Cl
Ts
Nt
Op

Organization

Sales Account Name
Photographer

Status
New

Rejection Reason

Status Description

Department

Title

Website

Lead Source
Mobile Genius

Transaction ID
▯

Language Preference

Opportunity Amount
0.00

Okay To Contact
☐

Acceptable Contact Methods

Primary Phone

RTM
Retail

Mobile
9058325111

Assigned to

Other Phone

Email
laura.may@rogers.com

Home Phone

Description

Show more...

Calls

Tasks

Notes (1)

	Subject	Last Modified	Date Created	Assigned User
☆	Notes from Mobile Genius	11/01/2016 02:41pm	11/01/2016 02:41pm	

Opportunities

Lead Status

View Lead Source here

Team member responsible for actioning Lead

View Calls, Tasks, Notes, and Opportunities associated with the Lead

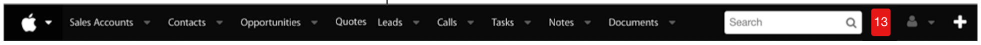
Enriching Leads

Apple CRM has functionality to enrich a Lead after it is sent from EasyPay, MobileGenius, Concierge or Web Form. This next section contains a few common ways you may enrich the Lead information. This guide does not contain a complete catalogue of information you can enrich on a Lead but the workflow is largely the same across the Lead module. For example, you can update an Address and that workflow would be similar to how you can update Contact information on a Lead.

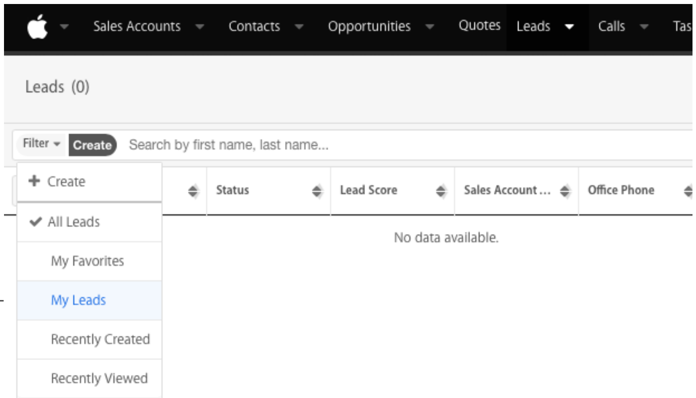
Editing a Lead

1. Select the Leads module by clicking Leads on the toolbar.

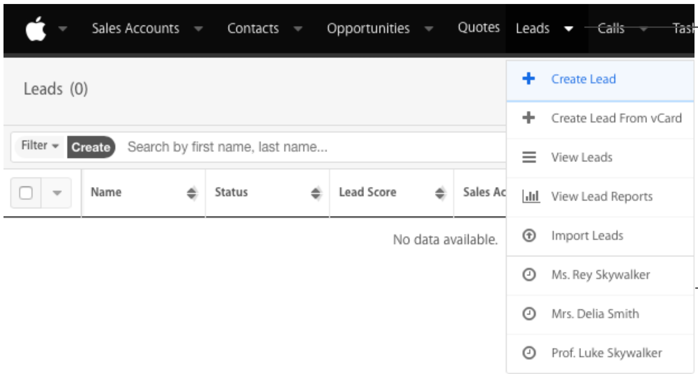
Leads view is accessed from Leads on the toolbar


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
13

2. Locate the Lead by searching for it in the Filter search bar. Or find Leads you have managed by selecting My Leads or Recently Created. Alternatively, select the drop down menu next to the Leads module button in the toolbar and a list of your recent Leads will appear.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tas
Leads (0)
Filter
Create
Search by first name, last name...
Create
All Leads
My Favorites
My Leads
Recently Created
Recently Viewed
Status
Lead Score
Sales Account ...
Office Phone
No data available.

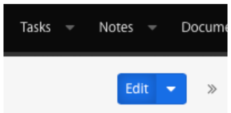
Select the My Leads, Recently Created or Recently Viewed from the Filter drop down.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tas
Leads (0)
Filter
Create
Search by first name, last name...
Name
Status
Lead Score
Sales Ac
No data available.
Create Lead
Create Lead From vCard
View Leads
View Lead Reports
Import Leads
Ms. Rey Skywalker
Mrs. Delia Smith
Prof. Luke Skywalker

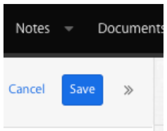
Select the drop down arrow next to Leads

View recent Leads from the Leads drop down menu on the toolbar.

3. Once you have selected and are viewing the Lead, click the blue Edit button in the upper right hand corner.


Tasks
Notes
Docume
Edit

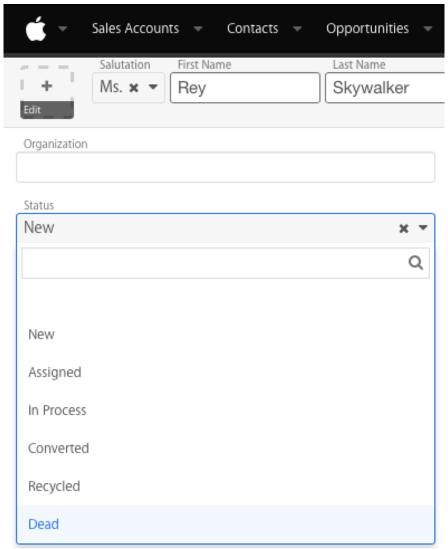
4. Edit the desired information in the Lead and click Save.



Changing the Status of a Lead

1. When viewing a Lead, click the Edit button.

2. Select the Status drop down menu under the Organization field.



Salutation: Ms.
First Name: Rey
Last Name: Skywalker
Organization:
Status: New

3. Lead status can be one of the following:

Apple CRM Status		Engage Status
New	A Lead that was recently created or added to Apple CRM and has not been yet been actioned.	New
Assigned	Lead that was recently added, viewed and a member of the team has been set to follow up.	N/A
In Process	Lead that has been viewed and or contacted and we are actively pursuing but have not yet made a decision to convert.	Active
Converted	Lead that a team member followed up with and converted to a Sales Account and or sale.	Qualified
Recycled	Lead that a team member followed up with but could not identify an Opportunity to work with them now but there could be an Opportunity to reengage at a later date through outbound marketing	N/A
Archived	Lead that we have decided to not add to our customer list after determining there is no Opportunity for us to work with them either now or in the future	Archived

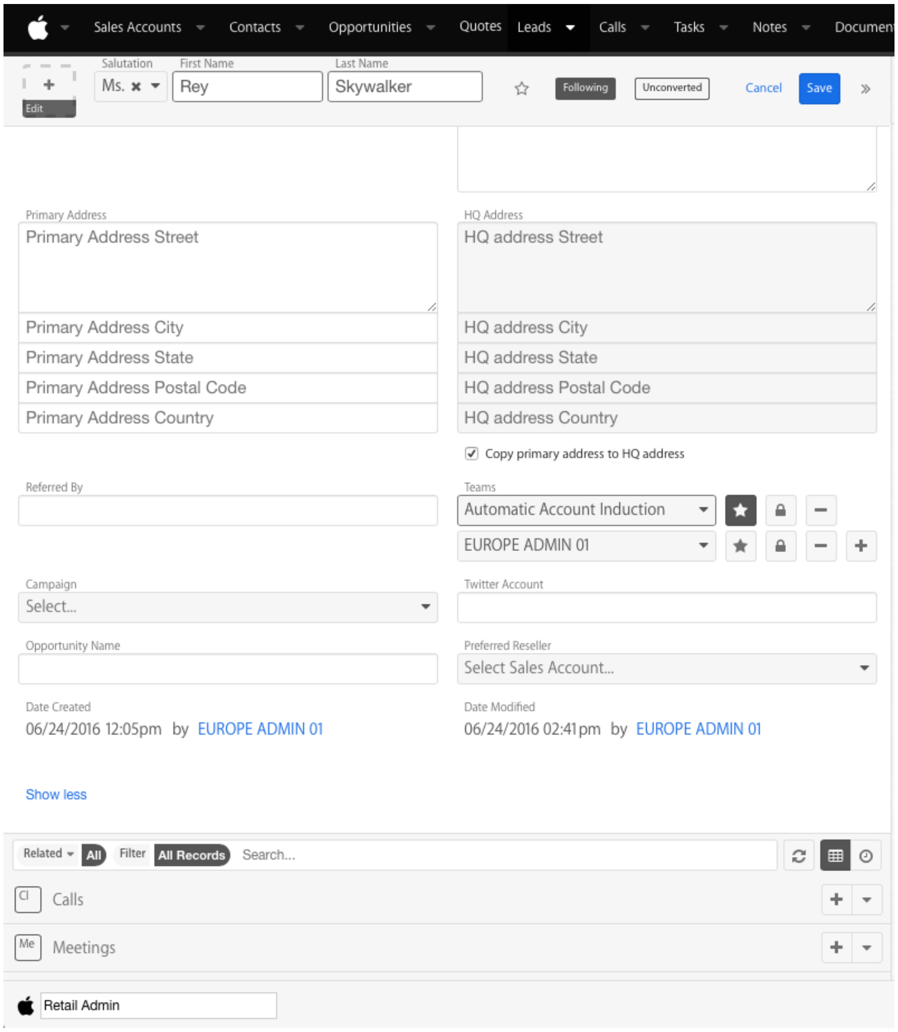
4. Once you select the right status, click the blue Save button in the upper right corner.

Adding an Address to a Lead

1. When viewing a Lead, click the blue Edit button in the upper right hand corner.

2. At the bottom of the Lead, click Show More.

3. Here, you can add in a Primary Address and HQ Address (if applicable).


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documen
Edit
Following
Unconverted
Cancel
Save
Show less
Related
All
Filter
All Records
Search...
Calls
Meetings
Retail Admin

Salutation: Ms.
First Name: Rey
Last Name: Skywalker

Primary Address: Primary Address Street, Primary Address City, Primary Address State, Primary Address Postal Code, Primary Address Country

HQ Address: HQ address Street, HQ address City, HQ address State, HQ address Postal Code, HQ address Country

☑ Copy primary address to HQ address

Referred By:

Teams: Automatic Account Induction; EUROPE ADMIN 01

Campaign: Select...

Twitter Account:

Opportunity Name:

Preferred Reseller: Select Sales Account...

Date Created: 06/24/2016 12:05pm by EUROPE ADMIN 01

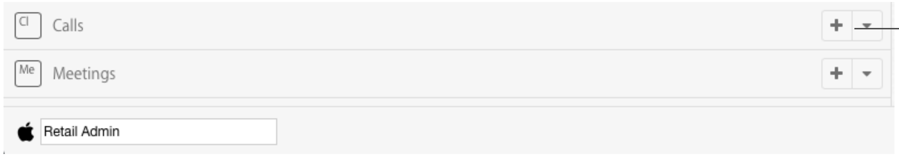
Date Modified: 06/24/2016 02:41pm by EUROPE ADMIN 01

4. Complete the required fields as indicated. Apple CRM will indicate if any of the required fields are missing or invalid. Once completed, click the blue Save button in the upper right hand corner.

Cl

Adding Calls to a Lead

1. When viewing a Lead, scroll to the bottom and select the "+" Create button to the right of the Calls sub-panel.


Cl
Calls
Me
Meetings
Retail Admin

Click the + button in the Calls sub panel and select Create.

2. A Call window will appear that requires you to complete the Call Subject, Start Date and Start time. Enter these details.

3. If needed, select the Direction of Call (Inbound or Outbound).

4. Add a Description of the Call including key details such as an agenda of topics to be covered.

5. When a Call is created from a Lead, it will be automatically related to that Lead. You can also select a reason for the Call in the Regarding drop down menu.

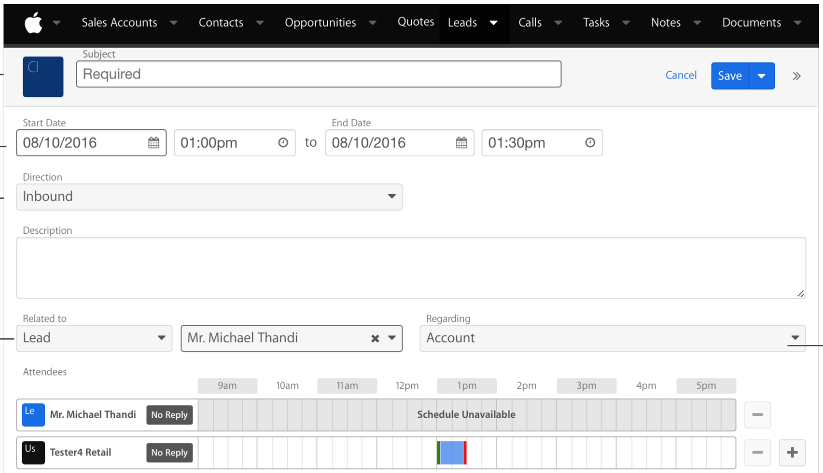
6. Click the Save button in the upper right hand corner.

Enter the Call Subject here

Enter Start Date and Time here

Select if this will be an Inbound or Outbound Call

The Call will be automatically related to the Lead when created from a Lead


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Cl
Cancel
Save
Attendees
9am
10am
11am
12pm
1pm
2pm
3pm
4pm
5pm
Le
No Reply
Schedule Unavailable
Us
No Reply

Subject: Required

Start Date: 08/10/2016 01:00pm to End Date: 08/10/2016 01:30pm

Direction: Inbound

Description:

Related to: Lead — Mr. Michael Thandi

Regarding: Account

Attendees: Mr. Michael Thandi; Tester4 Retail

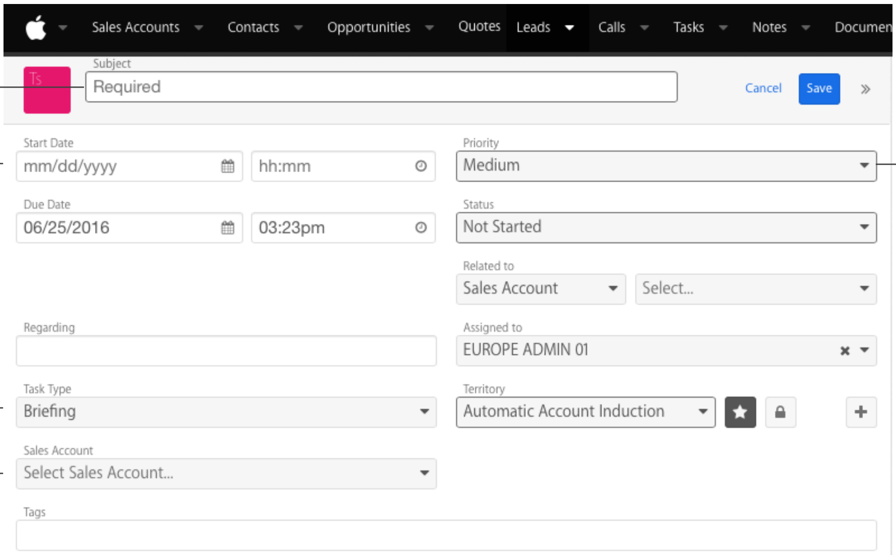
Select a reason for the Call from the Regarding drop down menu

Adding a Task to a Lead

1. In some cases, you may need to add a Task to a Lead to perform an action such as a reminder to follow up with the Lead. Start by scrolling to the bottom of the Lead and clicking the "+" Create button to the right of the Task sub-panel.

2. The Task can be given a Subject, Priority, Status, Date and Time, and Task Type. It may also be linked to an existing Sales Account from this screen if the Lead is related to an existing Sales Account.

3. Once finished, click the blue Save button in the upper right hand corner.



Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documen
Ts
Cancel
Save

Subject: Required

Start Date: mm/dd/yyyy hh:mm

Due Date: 06/25/2016 03:23pm

Priority: Medium

Status: Not Started

Related to: Sales Account Select...

Regarding:

Assigned to: EUROPE ADMIN 01

Task Type: Briefing

Territory: Automatic Account Induction

Sales Account: Select Sales Account...

Tags:

Enter a Task subject here

Enter a Start Date and Time

Select a Task type

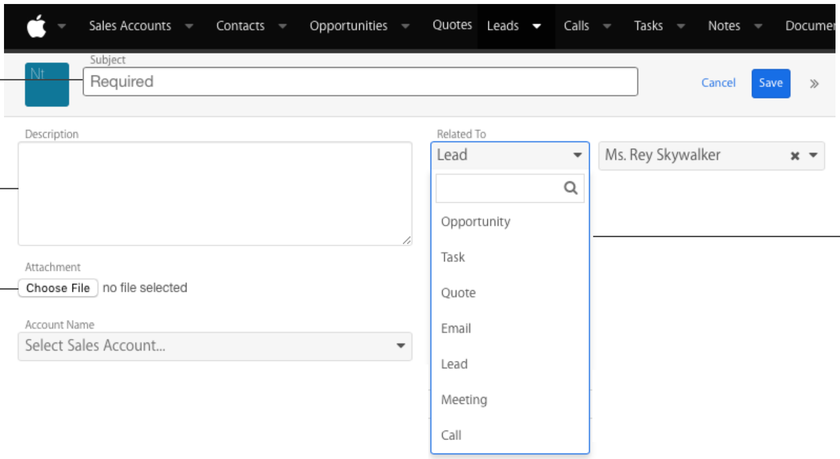
Link to a Sales Account here

Select a priority status depending on the urgency of completing the Task

Adding a Note to a Lead

1. To add a Note to a Lead, scroll to the bottom of the Lead and select the "+" Create button to the right of the Note sub-panel.

2. The Note can be given a Subject and Description. It may also be related to an existing Sales Account, Contact, Opportunity, Task, Quote, Email, Lead, Meeting or Call.



Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Docume
Nt
Cancel
Save
Choose File
Opportunity
Task
Quote
Email
Lead
Meeting
Call

Subject: Required

Description:

Attachment: no file selected

Account Name: Select Sales Account...

Related To: Lead Ms. Rey Skywalker

Enter a Note subject

Enter a Description here

Attach a file by selecting Choose File

Relate to a Sales Account, Contact, Opportunity, Task, Quote, Email, Lead, Meeting or Call here

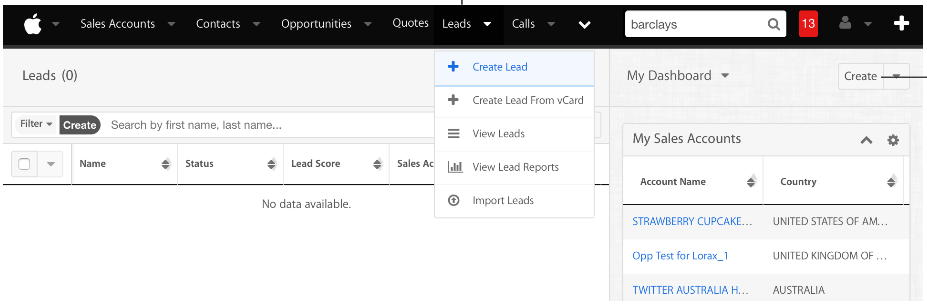
3. An Attachment may also be included by clicking the "Choose File" option under "Attachment." You will then need to Choose the attachment you wish to add from your Mac.

Creating a new Lead in Apple CRM

Typically, Introductions are created via EasyPay, MobileGenius, Concierge, and the apple.com WebForm and sent to Apple CRM where they appear as Leads. There are some cases where you may need to create a new Lead (Introduction) within Apple CRM. For instance, if an Education or Enterprise Apple team member asks you to manage a customer or if you receive an Inbound Call from a new customer.

1. In the Toolbar, click the Leads button and select Create. Or, click the "+" button on the right side of the Toolbar and select Create Task.

Select Create Lead
from the Leads menu.

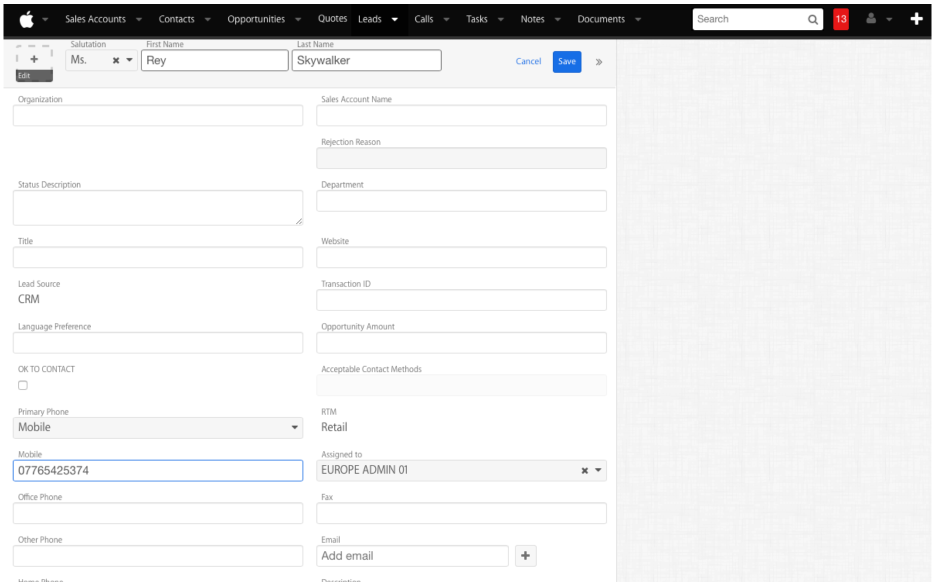

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
barclays
13
Leads (0)
Filter
Create
Search by first name, last name...
Name
Status
Lead Score
Sales Ac
Create Lead
Create Lead From vCard
View Leads
View Lead Reports
Import Leads
My Dashboard
Create
My Sales Accounts

No data available.

Account Name	Country
STRAWBERRY CUPCAKE…	UNITED STATES OF AM…
Opp Test for Lorax_1	UNITED KINGDOM OF …
TWITTER AUSTRALIA H…	AUSTRALIA

Or click the "+" icon
and select Create
Lead.

2. Complete the required fields as indicated by Apple CRM. Apple CRM will indicate if any of the required fields are missing or invalid.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
13
Edit
Cancel
Save
Organization
Sales Account Name
Rejection Reason
Status Description
Department
Title
Website
Transaction ID
Language Preference
Opportunity Amount
OK TO CONTACT
Acceptable Contact Methods
Office Phone
Fax
Other Phone

Salutation: Ms.
First Name: Rey
Last Name: Skywalker
Lead Source: CRM
Primary Phone: Mobile
RTM: Retail
Mobile: 07765425374
Assigned to: EUROPE ADMIN 01
Email: Add email

3. Click Save.

Activities

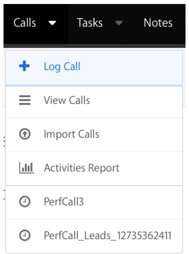
Types of Activities

Apple CRM has a variety of Activities that can be performed to make engaging a Sales Account, Contact, or following up on an Opportunity easier and more automated. There are four types of activities — Calls, Notes, and Tasks. The following sections will show you how to perform each Activity type. For all activities, make sure the Related to Field reflects the location you would like the activity to be shown in. Activities will not appear on Sales Account page unless they are related there.

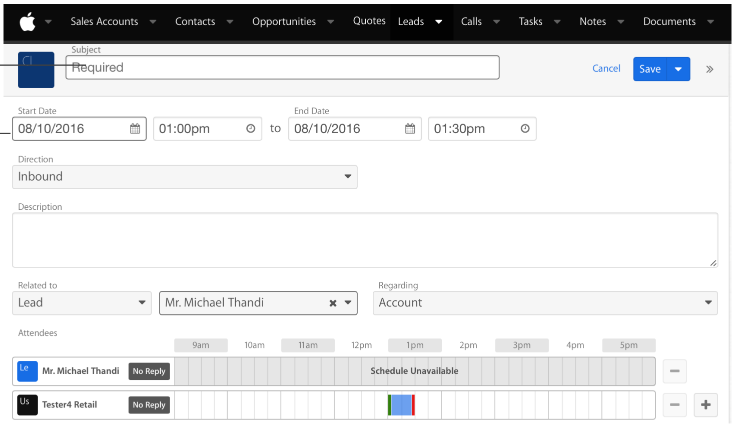
Calls

Logging an inbound or outbound Call

1. Select the Quick Create button (+) in the menu bar. Then choose Log Call.


Calls
Tasks
Notes
Log Call
View Calls
Import Calls
Activities Report
PerfCall3
PerfCall_Leads_12735362411

2. Complete the Subject field and enter a description of the Call.
3. Complete the Start Date and Time and End Date and Time.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Cancel
Save
Schedule Unavailable
No Reply
No Reply

Subject: Required

Start Date: 08/10/2016 01:00pm to End Date: 08/10/2016 01:30pm

Direction: Inbound

Description:

Related to: Lead — Mr. Michael Thandi

Regarding: Account

Attendees: 9am 10am 11am 12pm 1pm 2pm 3pm 4pm 5pm

Mr. Michael Thandi

Tester4 Retail

Enter the Call Subject here

Enter the Call Subject here

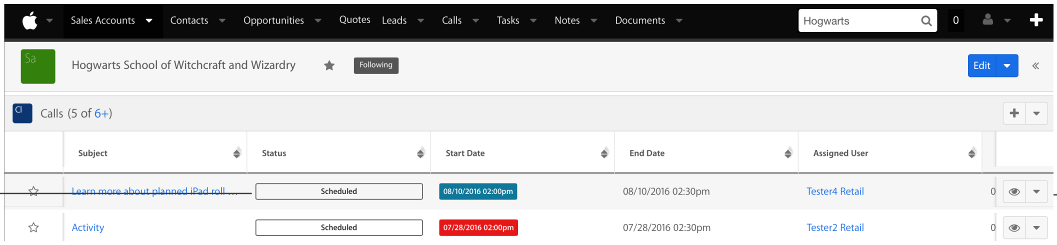
4. Select Direction Inbound or Outbound depending on the Call type.
5. Relate to a Sales Account, Contact, Task, Opportunity, or Quote. If this is a new Customer without a current Sales Account record, Contact record or other relatable item, create a new Lead.
6. Click Save.

DO NOT DOUBLE BOOK CALLS Apple CRM will not notify a user of two or more Calls scheduled for the same time. However, the Call List View does show the date and time of each Call scheduled to easily identify double booked Calls.

Completing a scheduled Call

To Schedule a Call, see the previous section to log an Outbound or Inbound Call and set the Start Date for a future time.

1. Locate the Call from the Calls sub-panel of a Sales Account, Contact, Lead or Opportunity..
2. Select the down arrow next to the Call you would like to complete and select Edit.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Hogwarts
0
Sa
Hogwarts School of Witchcraft and Wizardry
Following
Edit
Cl
Calls (5 of 6+)

	Subject	Status	Start Date	End Date	Assigned User		
☆	Learn more about planned iPad roll ...	Scheduled	08/10/2016 02:00pm	08/10/2016 02:30pm	Tester4 Retail	0	
☆	Activity	Scheduled	07/28/2016 02:00pm	07/28/2016 02:30pm	Tester2 Retail	0	

Change the
Status to Held

Select Edit
from the drop
down menu
next to the
Call.

3. To complete the Call, change the Status drop down menu from Scheduled to Held.
4. Click Save.

Notes and Tasks

Notes and Tasks will help you document and manage customer engagement.

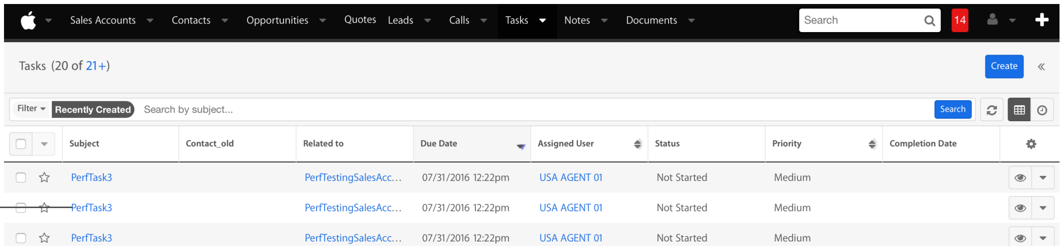
Notes — The Notes section can be used to document specific customer engagements, key customer and Opportunity details for SSO or Engagement Team approval and to attach supporting documentation such as customer Briefings.

Tasks — Tasks help our teams effectively managing relationships in Apple CRM. Users will create and manage Tasks associated with Sales Accounts and Opportunities. Tasks may be assigned to other team members in a territory (store).

Viewing Tasks

From the Tasks module, select a Task from the List View of Current Tasks.

Task List View

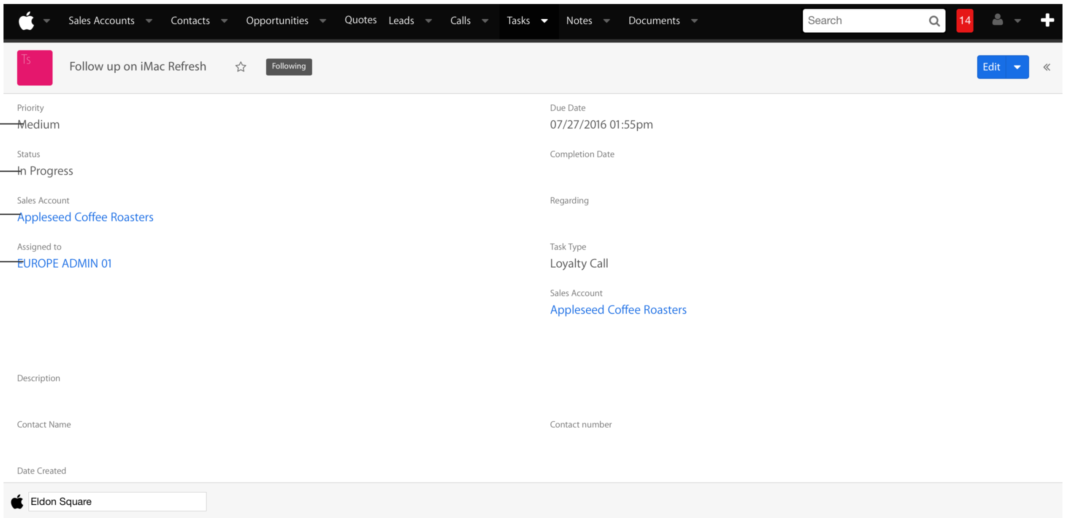

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Create
Filter
Recently Created
Search by subject...
Search

Tasks (20 of 21+)

Subject	Contact_old	Related to	Due Date	Assigned User	Status	Priority	Completion Date
PerfTask3		PerfTestingSalesAcc...	07/31/2016 12:22pm	USA AGENT 01	Not Started	Medium	
PerfTask3		PerfTestingSalesAcc...	07/31/2016 12:22pm	USA AGENT 01	Not Started	Medium	
PerfTask3		PerfTestingSalesAcc...	07/31/2016 12:22pm	USA AGENT 01	Not Started	Medium	

Select a Task from the List View

Task Detail View


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Ts
Following
Edit

Follow up on iMac Refresh

Priority
Medium

Due Date
07/27/2016 01:55pm

Status
In Progress

Completion Date

Sales Account
Appleseed Coffee Roasters

Regarding

Assigned to
EUROPE ADMIN 01

Task Type
Loyalty Call

Sales Account
Appleseed Coffee Roasters

Description

Contact Name

Contact number

Date Created

Eldon Square

View Priority Status

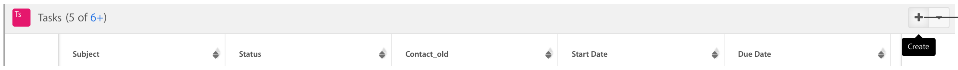
View Task Status

View Related Sales Account

Team member assigned to Task

Creating a New Task

1. From a Sales Account or Contact, locate the Tasks sub-panel and click the "+" to automatically populate available customer information in a new Task.


Ts
Tasks (5 of 6+)
Subject
Status
Contact_old
Start Date
Due Date
Create

Select Create button on Tasks sub panel from a Sales Account or Contact

2. Complete all required fields. Apple CRM will indicate if any of the required fields are missing or invalid.

3. Click the drop down menu for Status and select the appropriate status.

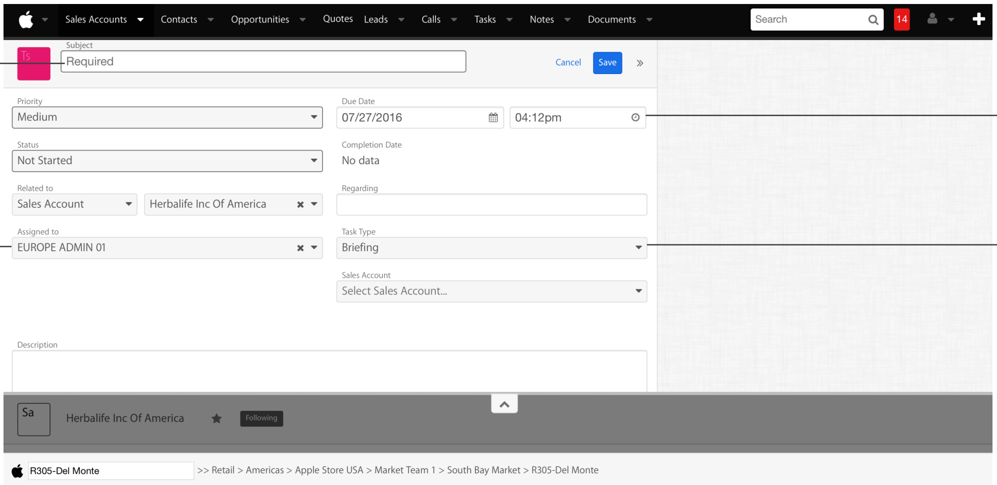
4. Ensure you assign a Task to the appropriate member of the Account Team or yourself.

5. Select a Task Type to describe the type of Task.

6. Click Save.

Enter a Subject here

Assign to yourself or another Account Team


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
14
Ts
Cancel
Save
Sa
Following

Subject: Required

Priority: Medium

Due Date: 07/27/2016 04:12pm

Status: Not Started

Completion Date: No data

Related to: Sales Account Herbalife Inc Of America

Regarding:

Assigned to: EUROPE ADMIN 01

Task Type: Briefing

Sales Account: Select Sales Account...

Description:

Herbalife Inc Of America

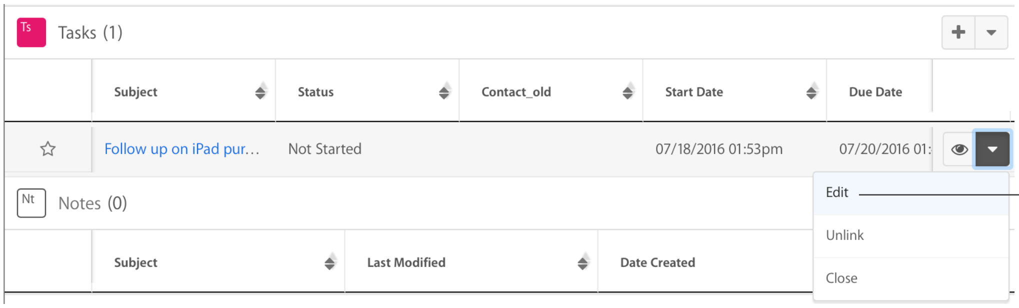
R305-Del Monte >> Retail > Americas > Apple Store USA > Market Team 1 > South Bay Market > R305-Del Monte

Set a Due Date and Time here

Select a Task type here

Editing and Completing open Tasks

1. From the Tasks Module, search or Filter to the Task that requires the edit. Or use Global Search or find the Task from the Tasks sub-panel in the Sales Account or Contact view. Here, the Task is shown from the sub-panel of a Sales Account.



Tasks (1)

	Subject	Status	Contact_old	Start Date	Due Date
☆	Follow up on iPad pur…	Not Started		07/18/2016 01:53pm	07/20/2016 01:

Notes (0)

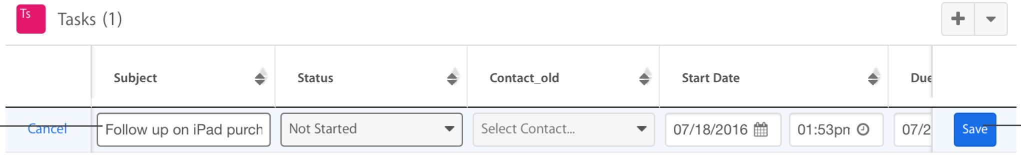
	Subject	Last Modified	Date Created

Select Edit from the drop down arrow in the Tasks sub-panel

2. Edit the desired information while ensuring that all necessary fields remain complete.

3. To complete a scheduled Task, change the Status to Completed while editing.

4. Once finished, click the Save button.



Tasks (1)

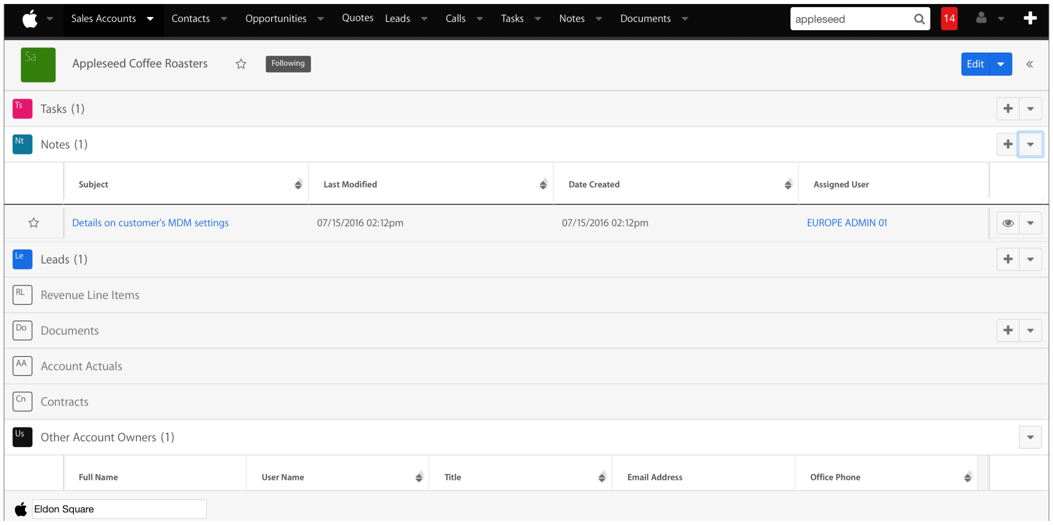
	Subject	Status	Contact_old	Start Date		Due
Cancel	Follow up on iPad purch	Not Started	Select Contact...	07/18/2016	01:53pn	07/2

Edit the desired information here

Select the Save button

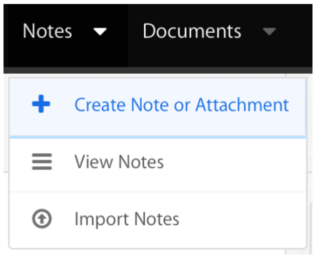
Creating a new Note

1. From a Sales Account, Opportunity, Quote, Meetings, Task, Calls or Contact, locate the Notes sub-panel and click the "+" to automatically populate available customer information in a new Note.

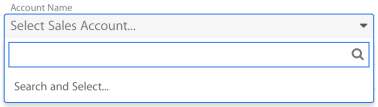

Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
appleseed
14
Appleseed Coffee Roasters
Following
Edit
Tasks (1)
Notes (1)
Leads (1)
Revenue Line Items
Documents
Account Actuals
Contracts
Other Account Owners (1)
Full Name
User Name
Title
Email Address
Office Phone
Eldon Square

Subject	Last Modified	Date Created	Assigned User
Details on customer's MDM settings	07/15/2016 02:12pm	07/15/2016 02:12pm	EUROPE ADMIN 01

2. Or, click the "+" button on the Toolbar and select Create Note or Attachment.


Notes
Documents
Create Note or Attachment
View Notes
Import Notes

3. If created from the Notes drop down in the Toolbar, relate the Note with one of the following: a Sales Account, Contact, Opportunity, Task, Quote, Quoted Line Item, Target, Case, Lead, or Call.

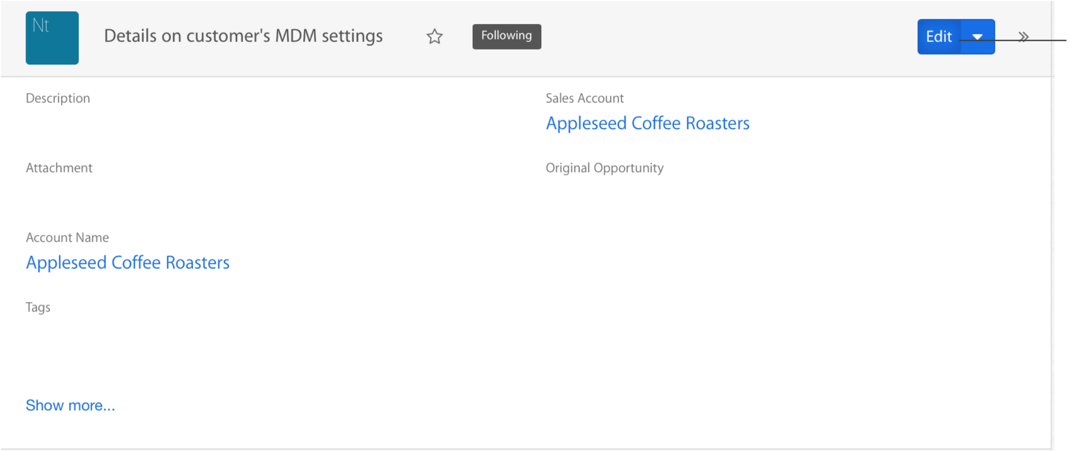

Account Name
Select Sales Account...
Search and Select...

4. Enter all of the required information. Apple CRM will indicate if any of the required fields are missing or invalid.

5. Click the Save button in the right corner.

Editing an existing Note

1. From the Notes tab, use the Filters and Search functions to locate the desired Note.
2. Or, locate the desired Note from the Notes sub-panel of a Sales Account, Contact, Opportunity, Call, Quote, Document, Meeting or Task.
3. Select the Note and in the Notes detail view, select Edit.



Details on customer's MDM settings

Description

Sales Account
Appleseed Coffee Roasters

Attachment

Original Opportunity

Account Name
Appleseed Coffee Roasters

Tags

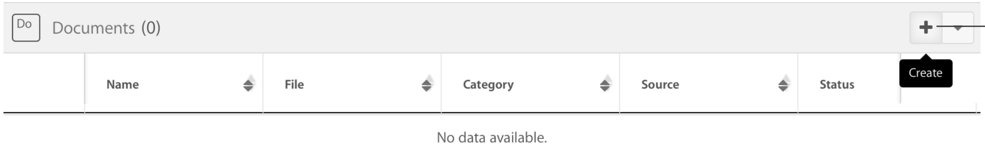
Show more...

Select the Edit button

4. Complete the Note edit and click the Save button.

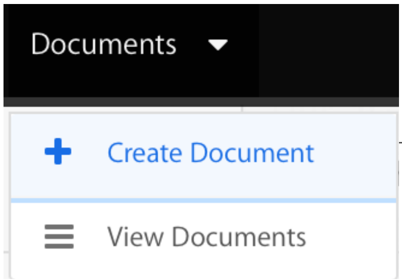
Creating a new Document (Uploading an Attachment)

1. From an Opportunity, Sales Account, Contact, Quote, Call, Meeting, or Task, locate the Document sub-panel and click the "+".


Do
Documents (0)
Name
File
Category
Source
Status
Create
No data available.

Select the Create button on the Document sub-panel

2. Or, click down arrow next to the Documents view in the Toolbar and select Create Document.

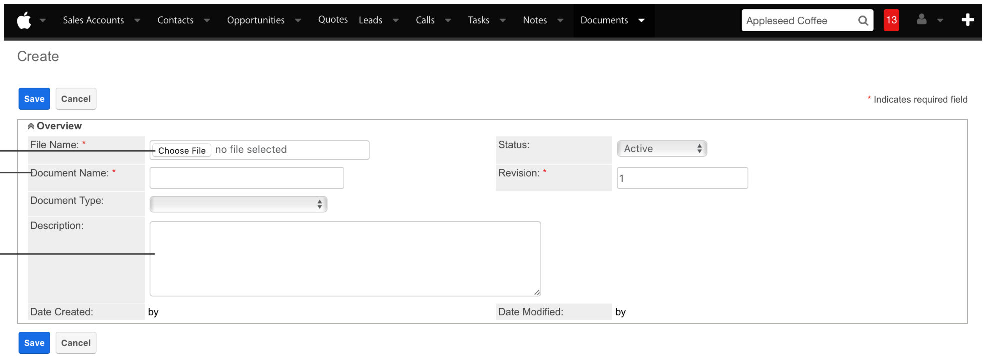

Documents
Create Document
View Documents

Select Create Document from the Documents drop down in the Toolbar

3. Select file by clicking Choose File or drag and dropping the file in the box next to file name.

4. Add a description of the Document and select Document Type.

5. Click Save on the bottom left when information is accurate and complete.


Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Appleseed Coffee
13
Save
Cancel
Choose File

Create

* Indicates required field

Overview

File Name: * no file selected

Document Name: *

Document Type:

Description:

Date Created: by

Status: Active

Revision: * 1

Date Modified: by

Upload a file here

Enter a Document Name

Add a Document description here

DOCUMENTS ARE NOT ADDED TO OPPORTUNITIES AUTOMATICALLY Note that Documents added to a Sales Account are not automatically added to an Opportunity. If a Document such as a Tax Exempt certificate that is attached to the Sales Account is needed for a specific Opportunity, make sure the Document is attached to the Opportunity.

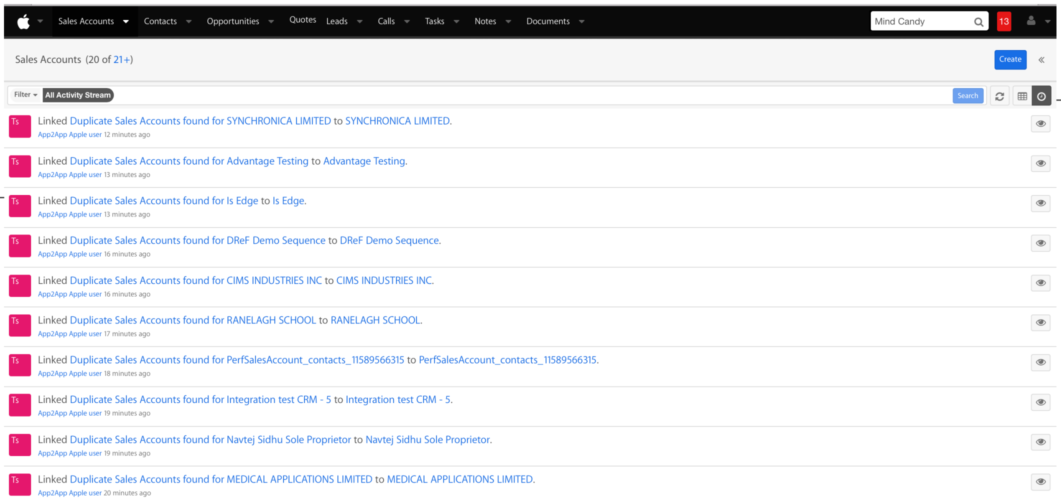
Activity Stream

The Activity Stream shows Users a list of activities and actions (for example: Tasks, Calls, and Notes) performed on a variety of categories such as Sales Accounts, Contacts, and Opportunities. This feature is enabled when you opt in to Follow records that are important to you. This will give you a personal view on the most important recent actions with your customers.

This view is available across multiple modules and the Activity Stream view accessed from the drop down menu next to the Apple logo. Use the Activity Stream as a powerful tool to stay up to speed on recent activity from you and your team.

Using the Activity Stream

Access the Activity Stream for a specific category such as Sales Accounts by toggling between List View and Activity Stream view within a module.



View a list of recent activity for the categories you are viewing such as Sales Accounts in this example

Use the List View and Activity View buttons to toggle between views

Sales Accounts (20 of 21+)

Linked Duplicate Sales Accounts found for SYNCHRONICA LIMITED to SYNCHRONICA LIMITED.
App2App Apple user 12 minutes ago

Linked Duplicate Sales Accounts found for Advantage Testing to Advantage Testing.
App2App Apple user 13 minutes ago

Linked Duplicate Sales Accounts found for Is Edge to Is Edge.
App2App Apple user 13 minutes ago

Linked Duplicate Sales Accounts found for DReF Demo Sequence to DReF Demo Sequence.
App2App Apple user 16 minutes ago

Linked Duplicate Sales Accounts found for CIMS INDUSTRIES INC to CIMS INDUSTRIES INC.
App2App Apple user 16 minutes ago

Linked Duplicate Sales Accounts found for RANELAGH SCHOOL to RANELAGH SCHOOL.
App2App Apple user 17 minutes ago

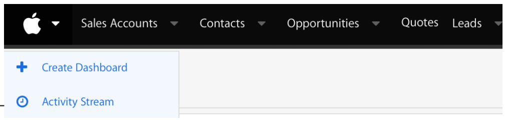
Linked Duplicate Sales Accounts found for PerfSalesAccount_contacts_11589566315 to PerfSalesAccount_contacts_11589566315.
App2App Apple user 18 minutes ago

Linked Duplicate Sales Accounts found for Integration test CRM - 5 to Integration test CRM - 5.
App2App Apple user 19 minutes ago

Linked Duplicate Sales Accounts found for Navtej Sidhu Sole Proprietor to Navtej Sidhu Sole Proprietor.
App2App Apple user 19 minutes ago

Linked Duplicate Sales Accounts found for MEDICAL APPLICATIONS LIMITED to MEDICAL APPLICATIONS LIMITED.
App2App Apple user 20 minutes ago

Or, access the Activity Stream for all modules from the drop down menu next to the Apple logo in the upper right hand corner.



Select Activity Stream from the drop down menu next to the Apple logo